

Chapter 5

Change in Work Status

Learning Objectives

- ⇒ Define terms, concepts, and procedures.
- ⇒ Process Leave without Pay Inactive Status (LWOP).
- ⇒ Execute Return from Leave.
- ⇒ Enter a termination.
- ⇒ Process Retirement.
- ⇒ Explain D.R.O.P. process and demonstrate how to enter the information.

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Leave without Pay (LWOP)


Leave without pay (LWOP) status may be necessary for a number of reasons, including maternity leave, military leave, and/or disciplinary action. The *LWOP-Inactive Status* action is for employees who remain away from work for more than 10 days. If an employee is absent from work without pay for less than 10 days, the employee cannot be placed on LWOP-Inactive Status. In most cases, annual and sick leave must be exhausted before LWOP is used. Contact the Office of Personnel Management (OPM) for necessary guidance and policy clarification.

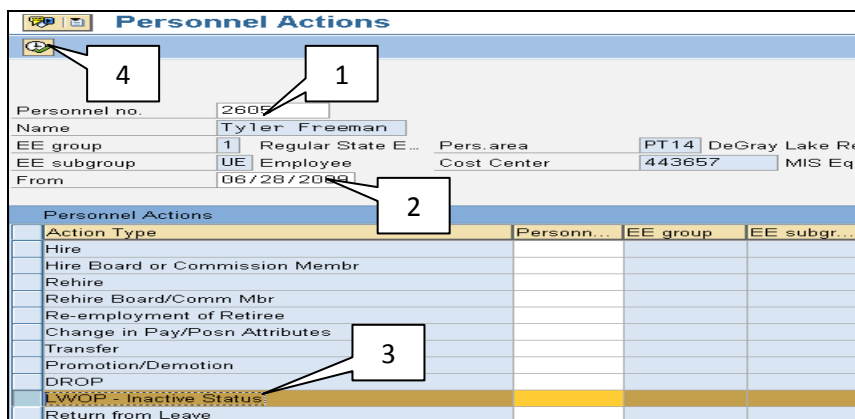
Payroll processing and time accrual stops while the employee is on LWOP-Inactive Status. The LWOP effective date is the last day the employee is in active status (their last working day). Ordinarily, the effective date must not be earlier than the beginning of the first pay period of the fiscal year. If an effective date earlier than the beginning of the first pay period of the fiscal year is necessary, the agency must submit a request with justification for approval to OPM. For additional information regarding pay period begin dates, consult the Bi-weekly Schedule of Pay Periods issued by OPM for pay period begin dates.

Time Management processes the LWOP via the employee's time sheet. If time is reflected on the CAT2 timesheet for the date the employee is placed on LWOP Inactive Status or any date thereafter, an error message states, "Timesheet entry after inactive period date must be deleted." This message indicates the *LWOP-Inactive Status* action was not saved. Before proceeding, contact the agency time-entry personnel for records correction.

Scenario: As the result of a worker's compensation claim effective June 28, 2009, Tyler is placed on leave without pay inactive status using transaction PA40 LWOP-Inactive Status (PA40) . Tyler anticipates returning to work August 10.

Action Steps:

1. Enter the personnel number.
2. Enter the effective date.
3. Select *LWOP-Inactive Status*.
4. <Execute>  to advance to the next screen.



The screenshot shows the 'Personnel Actions' screen. Callout 1 points to the 'Personnel no.' field containing '2609'. Callout 2 points to the 'From' date field containing '06/28/2009'. Callout 3 points to the 'LWOP - Inactive Status' option in the 'Action Type' list. Callout 4 points to the '<Execute>' button at the top left of the screen.

Personnel Actions			
Action Type	Personn...	EE group	EE subgr...
Hire			
Hire Board or Commission Membr			
Rehire			
Rehire Board/Comm Mbr			
Re-employment of Retiree			
Change in Pay/Posn Attributes			
Transfer			
Promotion/Demotion			
DROP			
LWOP - Inactive Status			
Return from Leave			

Actions (Infotype 0000)

There are four reason codes for LWOP-Inactive Status.

<u>Reason Code</u>	<u>Explanation</u>
Disciplinary	Employee is placed on leave without pay due to a disciplinary action.
Non-disciplinary	Employee is placed on regular leave without pay.
Workers' Compensation	Employee is placed on Workers' Compensation for an extended period of time.
Extended Military	Employee is placed on Military Leave, excluding the annual training.

Action Steps:


1. Select a reason code.

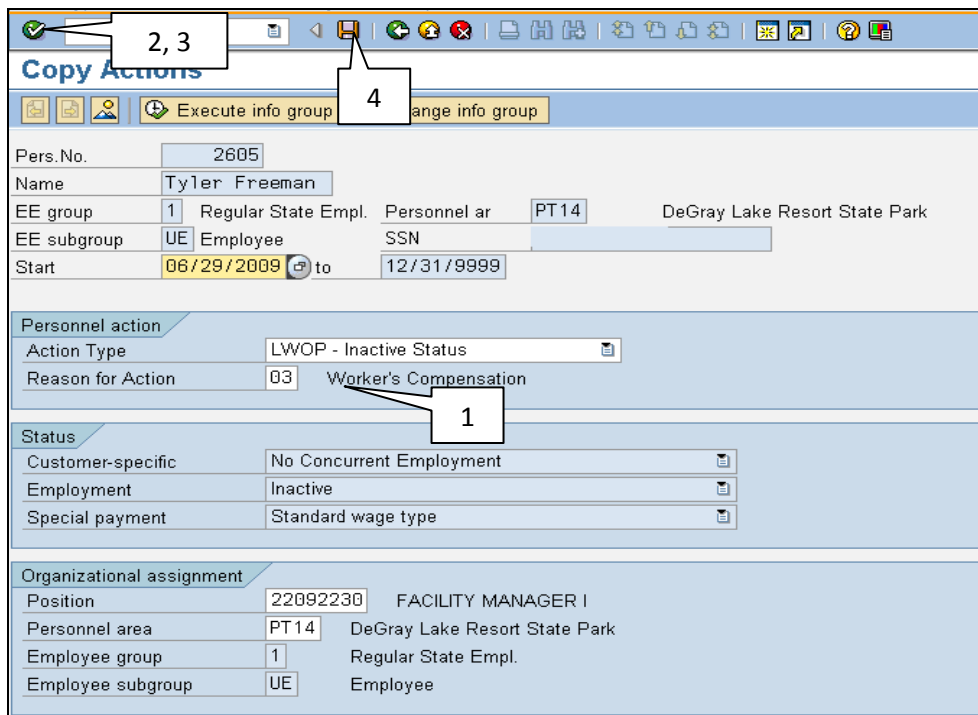
2. <Enter> . The system displays this message

 Record valid from 06/28/2009 to 12/31/9999 delimited at end

indicating the previous record's end date is changed.

3. <Enter>  to validate the information.

4. <Save>  to save the information.



Copy Actions

2, 3

4

Execute info group

Pers.No. 2605

Name Tyler Freeman

EE group 1 Regular State Empl. Personnel ar PT14 DeGray Lake Resort State Park

EE subgroup UE Employee SSN

Start 06/29/2009 to 12/31/9999

Personnel action

Action Type LWOP - Inactive Status

Reason for Action 03 Worker's Compensation

1

Status

Customer-specific No Concurrent Employment

Employment Inactive

Special payment Standard wage type

Organizational assignment

Position 22092230 FACILITY MANAGER I

Personnel area PT14 DeGray Lake Resort State Park

Employee group 1 Regular State Empl.

Employee subgroup UE Employee

Organizational Assignment (Infotype 0001)



When an employee is placed on LWOP-Inactive Status, notification of the effective date must be submitted to the appropriate administrators.

Action Steps:


1. Verify the information in the *PersAdmin*, *Time*, *PayAdmin*, and *Benefits Administrator* fields.

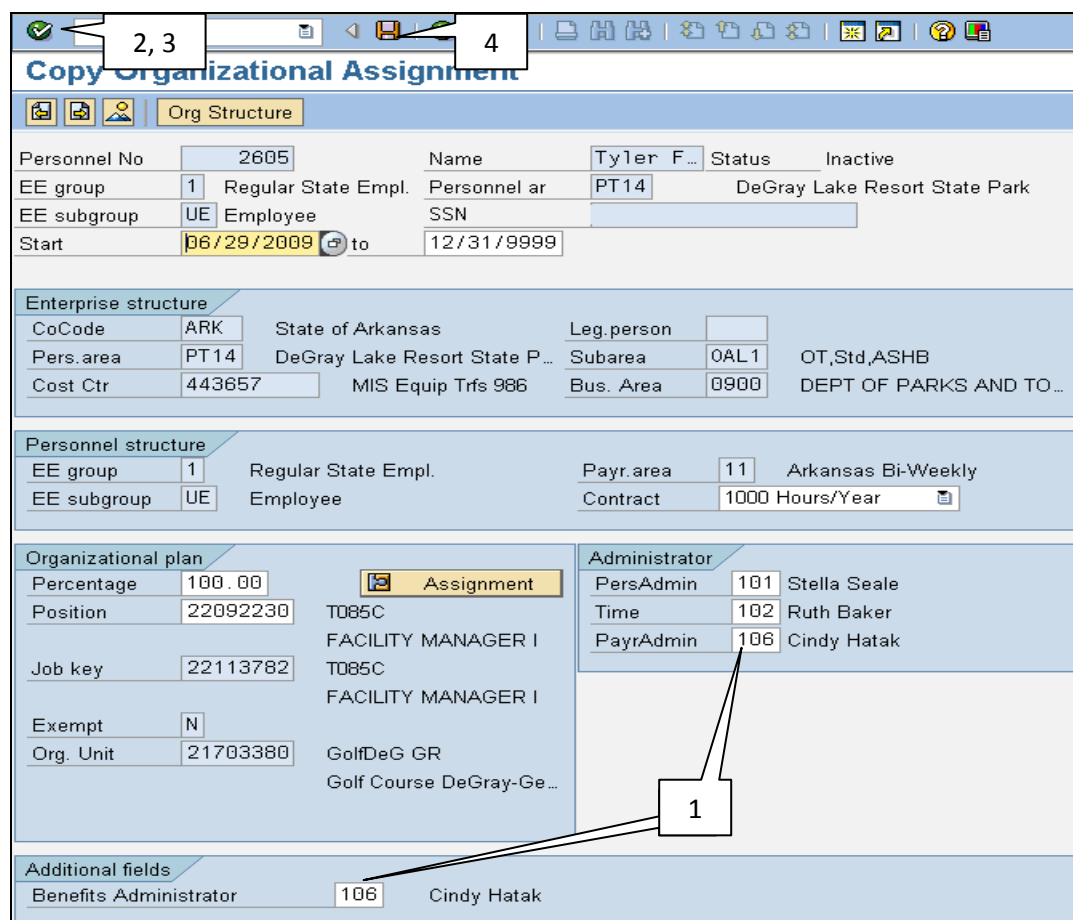
2. <Enter> . The system displays this message

 Record valid from 06/28/2009 to 12/31/9999 delimited at end

, indicating the previous record's end date is changed.

3. <Enter>  to validate the information.

4. <Save>  to save the information.






The screenshot shows the 'Copy Organizational Assignment' form. Callout 1 points to the 'Benefits Administrator' field in the 'Additional fields' section, which contains the value '106' and the name 'Cindy Hatak'. Callout 2 points to the 'Checkmark' icon in the top toolbar. Callout 3 points to the 'Checkmark' icon in the top toolbar. Callout 4 points to the 'Save' icon in the top toolbar.

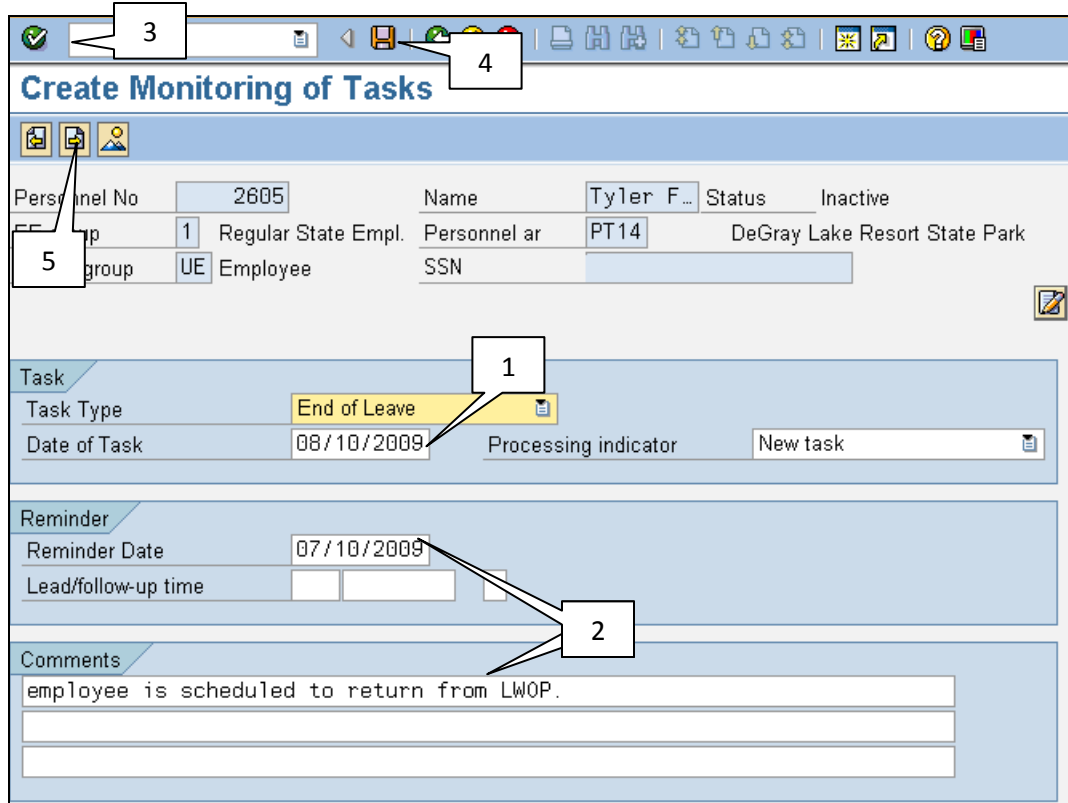
Copy Organizational Assignment			
Org Structure			
Personnel No	2605	Name	Tyler F...
EE group	1 Regular State Empl.	Personnel ar	PT14 DeGray Lake Resort State Park
EE subgroup	UE Employee	SSN	
Start	06/29/2009 to		12/31/9999
Enterprise structure			
CoCode	ARK State of Arkansas	Leg.person	
Pers.area	PT14 DeGray Lake Resort State P...	Subarea	OAL1 OT,Std,ASHB
Cost Ctr	443657 MIS Equip Trfs 986	Bus. Area	0900 DEPT OF PARKS AND TO...
Personnel structure			
EE group	1 Regular State Empl.	Payr.area	11 Arkansas Bi-Weekly
EE subgroup	UE Employee	Contract	1000 Hours/Year
Organizational plan			
Percentage	100.00	Assignment	
Position	22092230 T085C	FACILITY MANAGER I	
Job key	22113782 T085C	FACILITY MANAGER I	
Exempt	N		
Org. Unit	21703380 GolfDeG GR	Golf Course DeGray-Ge...	
Administrator			
PersAdmin	101 Stella Seale		
Time	102 Ruth Baker		
PayrAdmin	106 Cindy Hatak		
Additional fields			
Benefits Administrator	106	Cindy Hatak	

Monitoring of Tasks (Infotype 0019)

Although optional, this infotype serves as a valuable tool for tracking LWOP. The Ad Hoc Query report is a great tool for viewing this information. The *End of Leave* date alerts the agency of the employee's tentative return date.

Action Steps:

1. Task type defaults to *End of Leave*.
2. Enter the end date of the LWOP-Inactive Status in the *Date of Task* field and add any in the *Comments* field as required.
3. <Enter>  to validate the information.
4. < Save>  to save the information.
5. A second screen appears, <Next record>  to continue to the next infotype.



The screenshot shows the 'Create Monitoring of Tasks' SAP form. The form is divided into several sections: Personnel Data, Task, Reminder, and Comments. Callouts 1 through 5 point to specific fields and icons:

- Callout 1:** Points to the 'Task Type' field, which is set to 'End of Leave'.
- Callout 2:** Points to the 'Date of Task' field, which is set to '08/10/2009'.
- Callout 3:** Points to the 'Enter' key icon in the top toolbar.
- Callout 4:** Points to the 'Save' key icon in the top toolbar.
- Callout 5:** Points to the 'Next record' key icon in the top toolbar.

The form contains the following data:

Personnel No	Name	Status
2605	Tyler F...	Inactive

Additional data fields include:

- Personnel group: 1 Regular State Empl.
- Personnel ar: PT14
- DeGray Lake Resort State Park
- SSN: [Empty]

The 'Task' section shows:

- Task Type: End of Leave
- Date of Task: 08/10/2009
- Processing indicator: New task


The 'Reminder' section shows:

- Reminder Date: 07/10/2009
- Lead/follow-up time: [Empty]

The 'Comments' section contains the text: 'employee is scheduled to return from LWOP.'

Addresses (Infotype 0006)

This infotype stores the business and permanent residence addresses. Verify the employee's permanent residence address and telephone information.

If corrections are not required, <Next record>  to continue.

Action Steps for changes:


1. Review and make any required corrections.

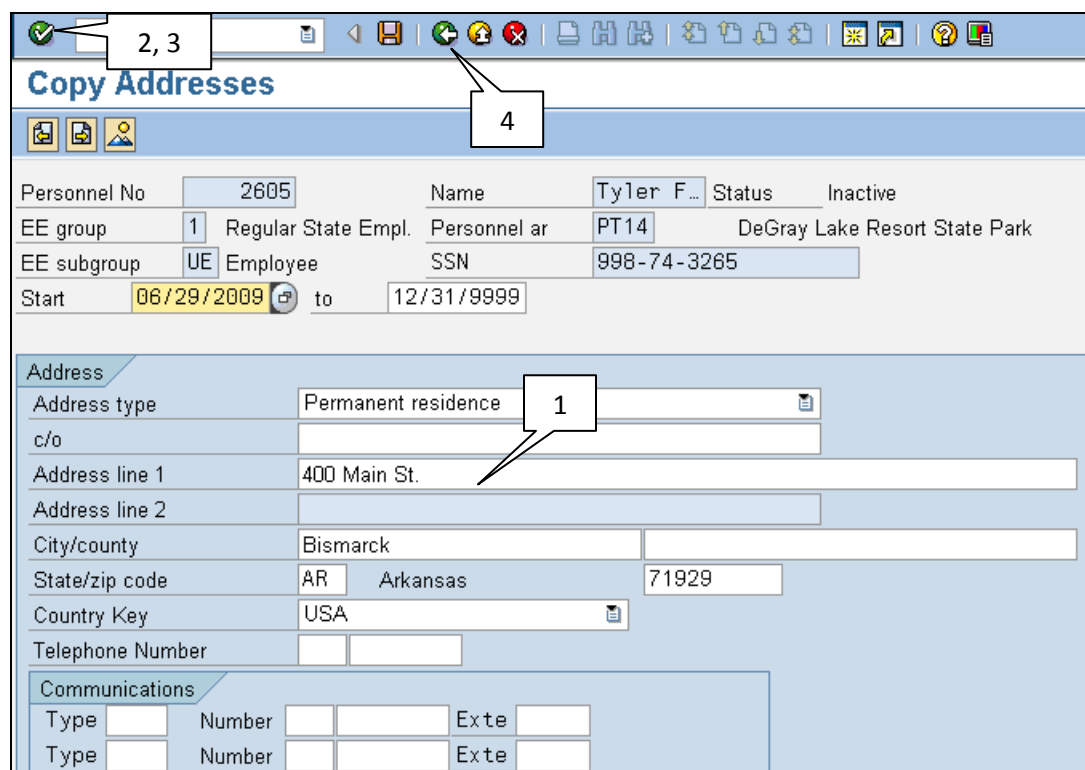
2. <Enter> . The system displays this message

 Record valid from 06/28/2009 to 12/31/9999 delimited at end

, indicating the previous record's end date is changed.

3. <Enter>  to validate the information.

4. <Save>  to save the information.



Copy Addresses

Personnel No. 2605 Name Tyler F... Status Inactive
 EE group 1 Regular State Empl. Personnel ar PT14 DeGray Lake Resort State Park
 EE subgroup UE Employee SSN 998-74-3265
 Start 06/29/2009 to 12/31/9999

Address

Address type Permanent residence
 c/o
 Address line 1 400 Main St.
 Address line 2
 City/county Bismarck
 State/zip code AR Arkansas 71929
 Country Key USA
 Telephone Number

Communications

Type Number Exte
 Type Number Exte

You have completed the *LWOP-Inactive Status* action.

Health Plan (Infotype 0167)

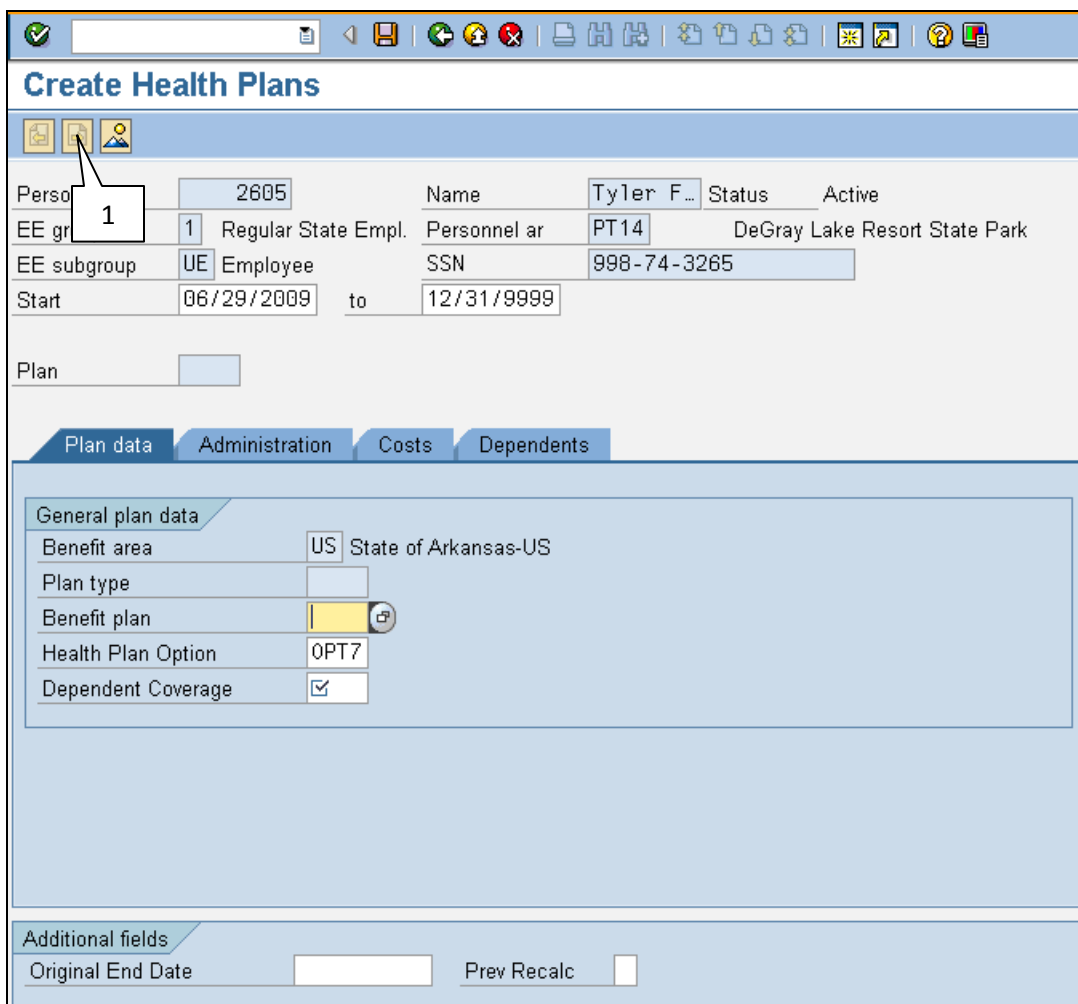


The Health Plan (IT0167) is reflected only if the employee does not have a health plan record at the time the LWOP-Inactive Status action (PA40) is entered.

Scenario: Tyler is not enrolled in any type of health plan.

Action Steps:

1. <Next record>  to continue.



Create Health Plans

Personnel number: 2605 Name: Tyler F... Status: Active
 EE group: 1 Regular State Empl. Personnel area: PT14 DeGray Lake Resort State Park
 EE subgroup: UE Employee SSN: 998-74-3265
 Start: 06/29/2009 to: 12/31/9999

Plan:

Plan data Administration Costs Dependents

General plan data

Benefit area: US State of Arkansas-US
 Plan type:
 Benefit plan:
 Health Plan Option: OPT7
 Dependent Coverage: ☒

Additional fields

Original End Date: Prev Recalc: ☐


Return from Leave

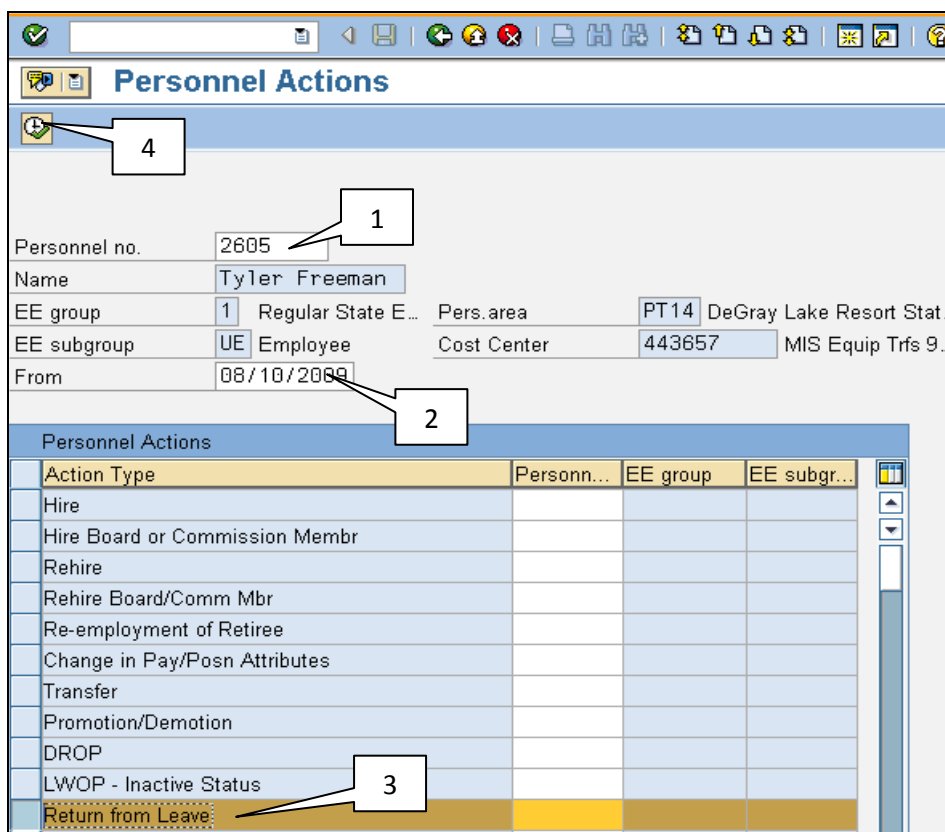
When an employee returns to work after being on LWOP, the process of returning the employee to active status must occur.

Ordinarily, the effective date must not be earlier than the beginning of the first pay period of the fiscal year. If an effective date earlier than the beginning of the first pay period of the fiscal year is necessary, the agency must submit a request with justification for approval to OPM. For additional information regarding pay period begin dates, consult the Bi-weekly Schedule of Pay Periods issued by OPM for pay period begin dates.

Scenario: On August 10, Tyler returns to work. Use transaction PA40 (Return from Leave) to place Tyler back into active status.

Action Steps:

1. Enter the personnel number.
2. Enter the effective date.
3. Select *Return from Leave*.
4. <Execute>  to advance to the next screen.



The screenshot shows the 'Personnel Actions' window. Callout 1 points to the 'Personnel no.' field containing '2605'. Callout 2 points to the 'From' date field containing '08/10/2009'. Callout 3 points to the 'Return from Leave' option in the 'Action Type' list. Callout 4 points to the 'Execute' button (a green square with a white clock icon) in the top left corner of the window.





Personnel Actions

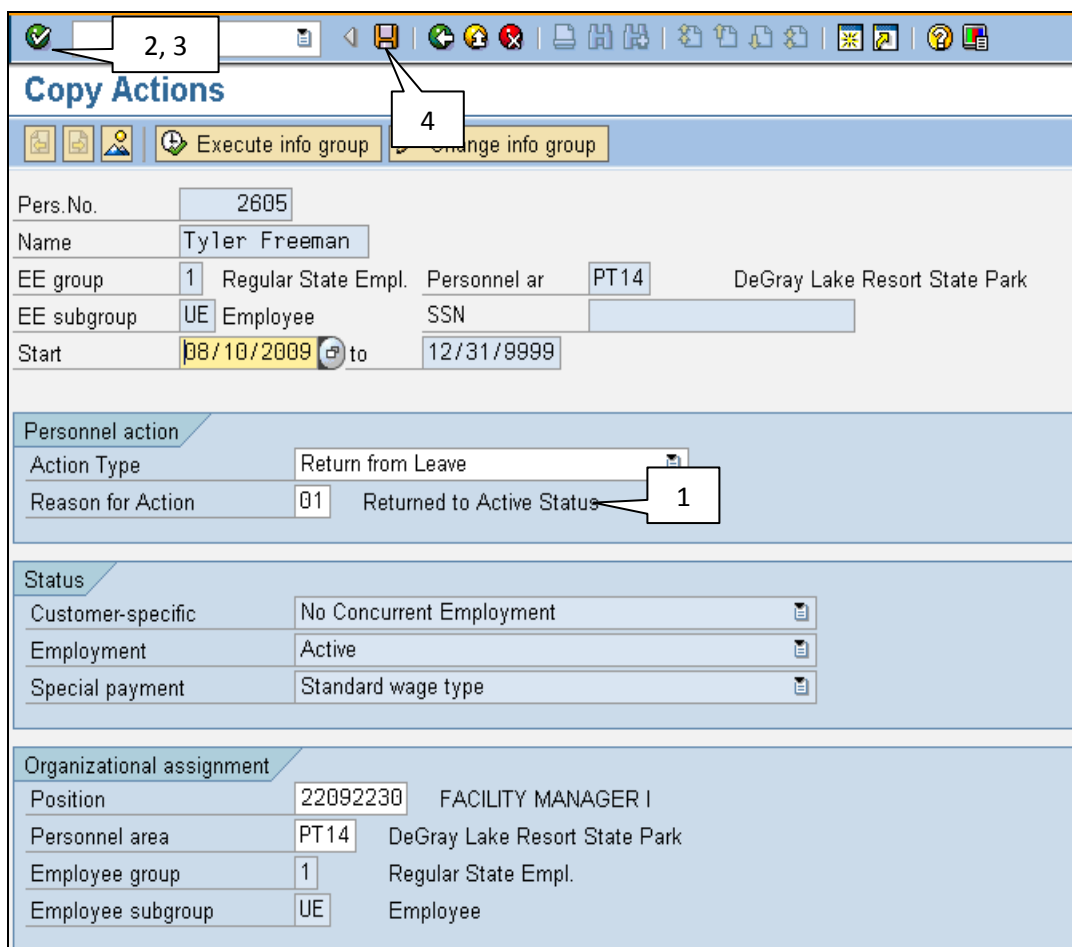
Personnel no. 2605
 Name Tyler Freeman
 EE group 1 Regular State E... Pers. area PT14 DeGray Lake Resort Stat.
 EE subgroup UE Employee Cost Center 443657 MIS Equip Trfs 9..
 From 08/10/2009

Action Type	Personn...	EE group	EE subgr...
Hire			
Hire Board or Commission Membr			
Rehire			
Rehire Board/Comm Mbr			
Re-employment of Retiree			
Change in Pay/Posn Attributes			
Transfer			
Promotion/Demotion			
DROP			
LWOP - Inactive Status			
Return from Leave			

Actions (Infotype 0000)

Action Steps:

1. Select *Reason for Action* code.
2. <Enter> . The system displays this message
 Record valid from 06/29/2009 to 12/31/9999 delimited at end, indicating the previous record's end date is changed.
3. <Enter>  to validate the information.
4. <Save>  to save the information.



Copy Actions

Execute info group Change info group

Pers.No. 2605
 Name Tyler Freeman
 EE group 1 Regular State Empl. Personnel ar PT14 DeGray Lake Resort State Park
 EE subgroup UE Employee SSN
 Start 08/10/2009 to 12/31/9999

Personnel action

Action Type Return from Leave
 Reason for Action 01 Returned to Active Status

Status

Customer-specific No Concurrent Employment
 Employment Active
 Special payment Standard wage type





Organizational assignment

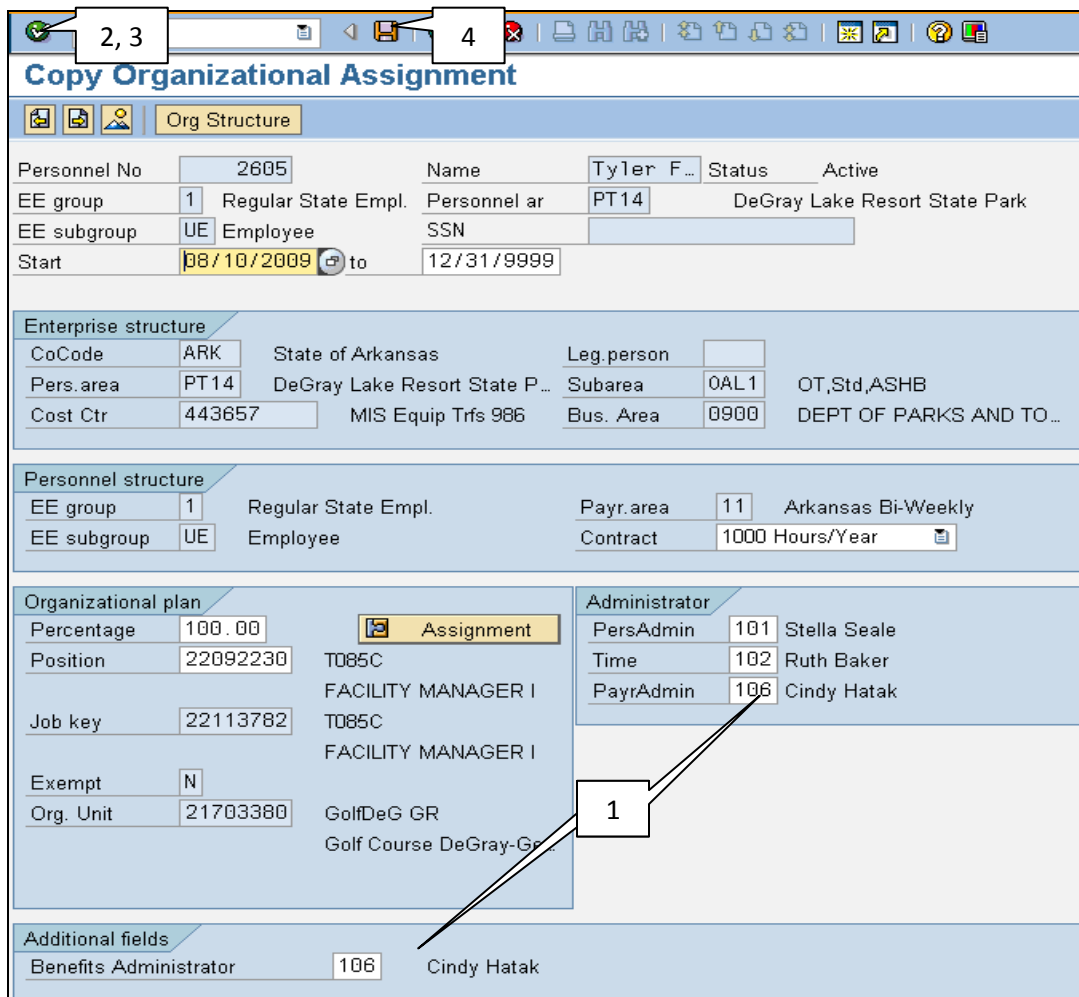
Position 22092230 FACILITY MANAGER I
 Personnel area PT14 DeGray Lake Resort State Park
 Employee group 1 Regular State Empl.
 Employee subgroup UE Employee

Organizational Assignment (Infotype 0001)

Specific guidelines apply when an employee returns to work from LWOP inactive status. Therefore, notification of the effective date on which an employee returns from LWOP inactive status must be submitted to the appropriate administrators.

Action Steps:

1. Verify the employee's *PersAdmin*, *Time*, *PayrAdmin*, and *Benefits administrator*.
2. <Enter> . The system displays this message
 Record valid from 06/29/2009 to 12/31/9999 delimited at end, indicating the previous record's end date is changed.
3. <Enter>  to validate the information.
4. <Save>  to save information.



Copy Organizational Assignment

Org Structure

Personnel No	2605	Name	Tyler F...	Status	Active
EE group	1 Regular State Empl.	Personnel ar	PT14	DeGray Lake Resort State Park	
EE subgroup	UE Employee	SSN			
Start	08/10/2009	to	12/31/9999		


Enterprise structure

CoCode	ARK	State of Arkansas	Leg.person	
Pers.area	PT14	DeGray Lake Resort State P...	Subarea	0AL1 OT,Std,ASHB
Cost Ctr	443657	MIS Equip Trfs 986	Bus. Area	0900 DEPT OF PARKS AND TO...

Personnel structure

EE group	1 Regular State Empl.	Payr.area	11 Arkansas Bi-Weekly
EE subgroup	UE Employee	Contract	1000 Hours/Year

Organizational plan

Percentage	100.00	 Assignment
Position	22092230 T085C FACILITY MANAGER I	
Job key	22113782 T085C FACILITY MANAGER I	
Exempt	N	
Org. Unit	21703380 GolfDeG GR Golf Course DeGray-Gr	

Administrator


PersAdmin	101	Stella Seale
Time	102	Ruth Baker
PayrAdmin	106	Cindy Hatak

Additional fields



Benefits Administrator	106	Cindy Hatak
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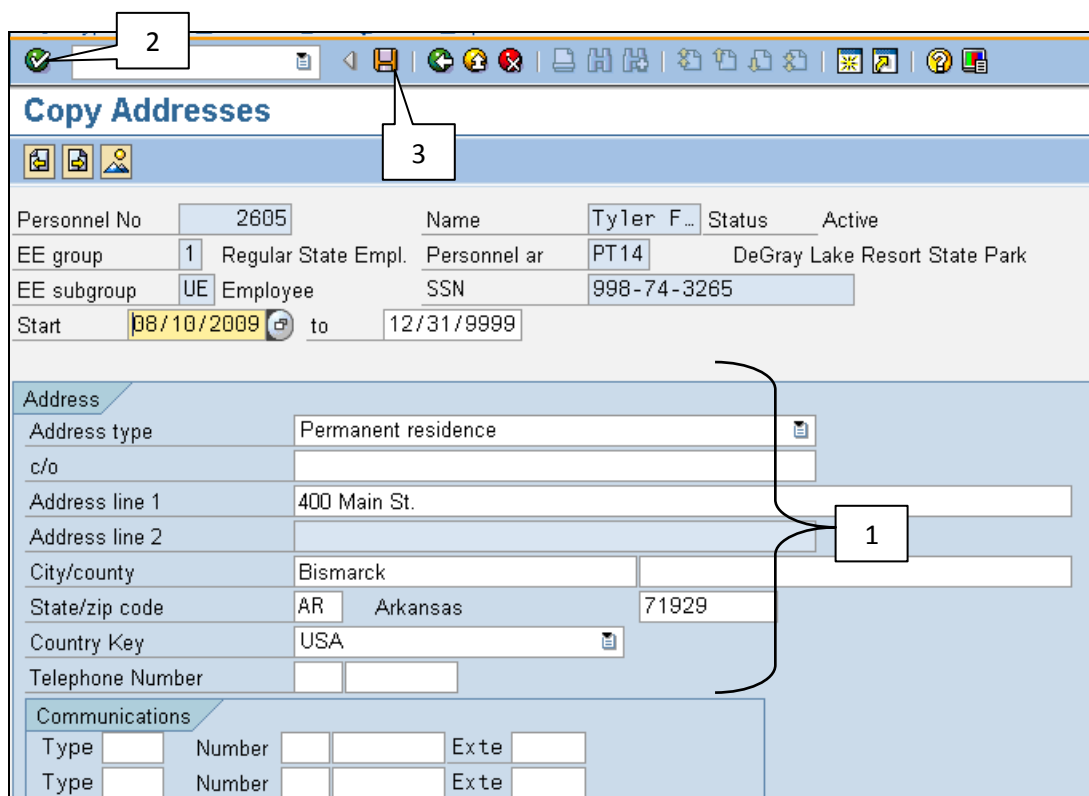
Addresses (Infotype 0006)

Verify employee's permanent residence address and telephone information.

If corrections are not required, <Next record>  to continue to the next infotype.

Action Steps:

1. Review and make any required corrections.
2. <Enter>  to validate the information.
3. <Save>  to save the information.



Copy Addresses

Personnel No 2605 Name Tyler F... Status Active
 EE group 1 Regular State Empl. Personnel ar PT14 DeGray Lake Resort State Park
 EE subgroup UE Employee SSN 998-74-3265
 Start 08/10/2009 to 12/31/9999

Address







Address type Permanent residence
 c/o
 Address line 1 400 Main St.
 Address line 2
 City/county Bismarck
 State/zip code AR Arkansas 71929
 Country Key USA
 Telephone Number

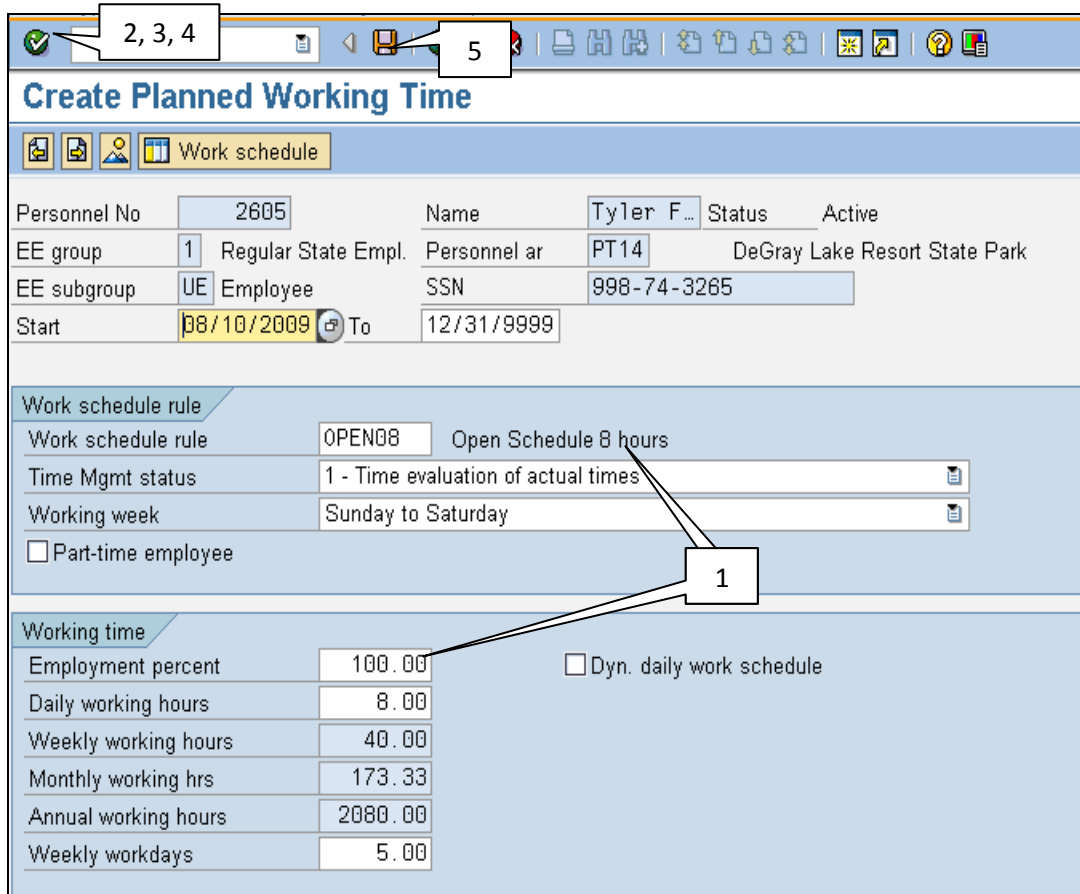
Communications

Type Number Exte
 Type Number Exte

Planned Working Time (Infotype 0007)

Action Steps:

1. Verify the work schedule and employment percent.
2. <Enter> . This message appears. 
3. <Enter> . The system displays this message , indicating the previous record's end date is changed.
4. <Enter>  to validate the information.
5. <Save>  to save the information and return to the *Personnel Actions* screen.



Create Planned Working Time

Work schedule

Personnel No 2605 Name Tyler F... Status Active

EE group 1 Regular State Empl. Personnel ar PT14 DeGray Lake Resort State Park

EE subgroup UE Employee SSN 998-74-3265

Start 08/10/2009 To 12/31/9999

Work schedule rule

Work schedule rule OPEN08 Open Schedule 8 hours

Time Mgmt status 1 - Time evaluation of actual times

Working week Sunday to Saturday

☐ Part-time employee

Working time

Employment percent 100.00 ☐ Dyn. daily work schedule

Daily working hours 8.00

Weekly working hours 40.00

Monthly working hrs 173.33

Annual working hours 2080.00

Weekly workdays 5.00

You have completed the *Return from Leave* action.

Health Plan (Infotype 0167)

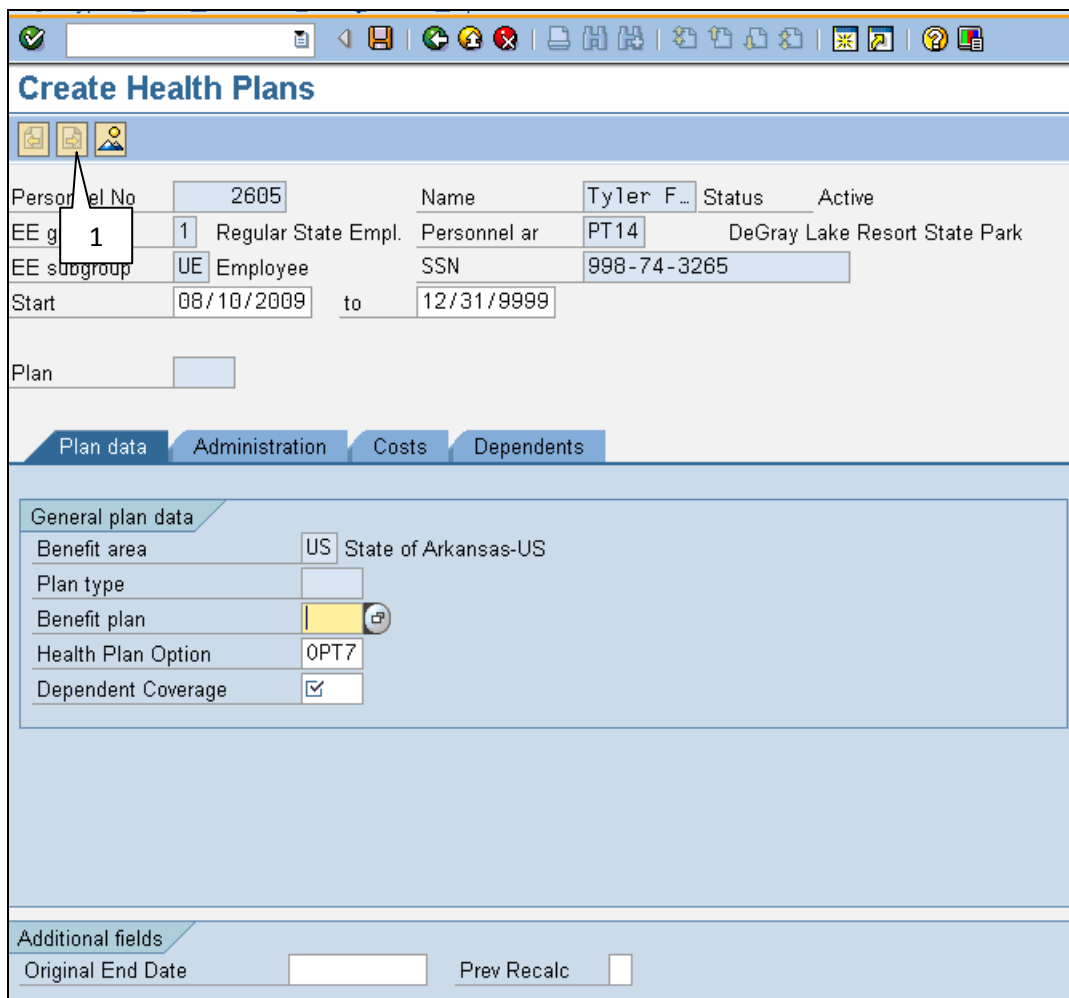


The Health Plan (IT0167) is reflected only if the employee does not have a health plan record at the time the Return from Leave action (PA40) is entered.

Scenario: Tyler is not enrolled in a health plan.

Action Step:

1. <Next record>  to continue.



Create Health Plans

Personnel No. 2605 Name Tyler F... Status Active

EE group 1 Regular State Empl. Personnel ar PT14 DeGray Lake Resort State Park

EE subgroup UE Employee SSN 998-74-3265

Start 08/10/2009 to 12/31/9999

Plan

Plan data Administration Costs Dependents

General plan data

Benefit area US State of Arkansas-US

Plan type

Benefit plan

Health Plan Option OPT7

Dependent Coverage ☒

Additional fields


Original End Date Prev Recalc

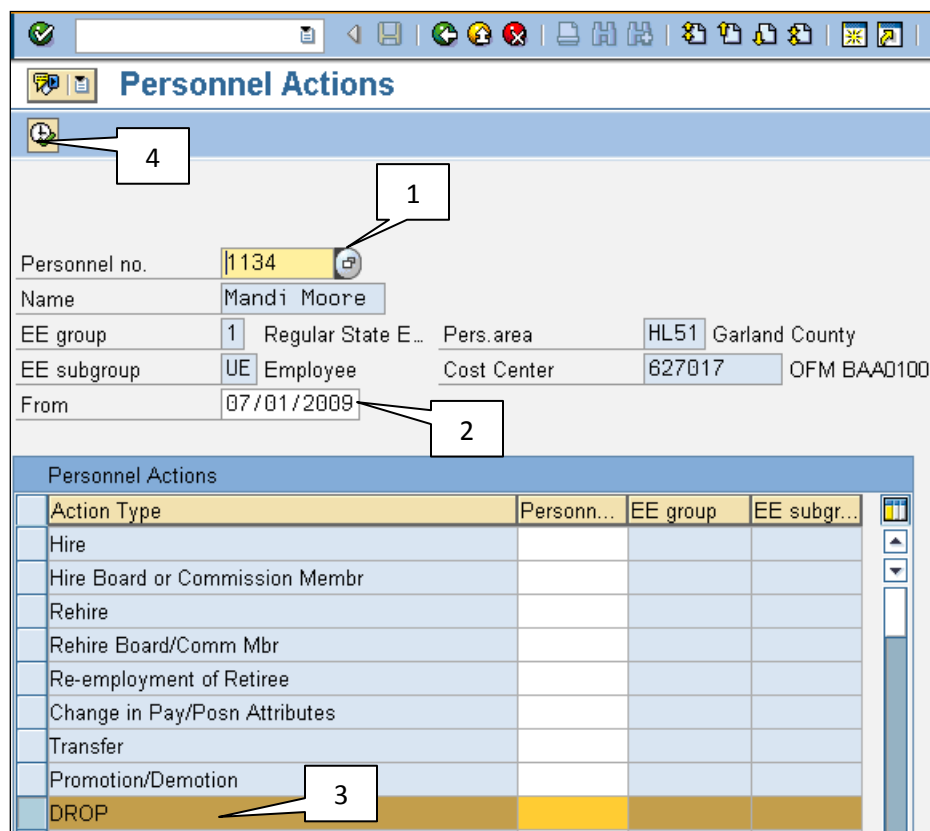
DROP (Deferred Retirement Option Plan)

The DROP (Deferred Retirement Option Plan) action does not stop employer matching or employee contribution from being made to the employee's retirement plan. The employee notifies the Agency Benefits Specialist after enrolling in DROP. The DROP action is located within the PA40 transaction. A workflow message is sent to the Benefits Administrator because overpayments may be paid to the retirement plan.

According to Retirement System policies, the start date is always the **First Day** of the Month. The effective date must not be earlier than the beginning of the first pay period of the fiscal year. Consult the Bi-weekly Schedule of Pay Periods issued by OPM for pay period begin dates. If it is necessary for the agency to have an effective date beyond the beginning of the first pay period of the fiscal year, the agency must submit a request with justification for approval to the Office of Personnel Management/State Payroll.

Action Steps:

1. Enter the *Personnel no.*
2. Enter the DROP effective date.
3. Select *DROP*.
4. <Execute>  to advance to the next screen.



Personnel Actions

Personnel no. 1134

Name Mandi Moore

EE group 1 Regular State E... Pers.area HL51 Garland County

EE subgroup UE Employee Cost Center 627017 OFM BAA0100

From 07/01/2009

Action Type	Personn...	EE group	EE subgr...
Hire			
Hire Board or Commission Membr			
Rehire			
Rehire Board/Comm Mbr			
Re-employment of Retiree			
Change in Pay/Posn Attributes			
Transfer			
Promotion/Demotion			
DROP			

Actions (Infotype 0000)

Action Steps:

1. Select the *Reason for Action*.

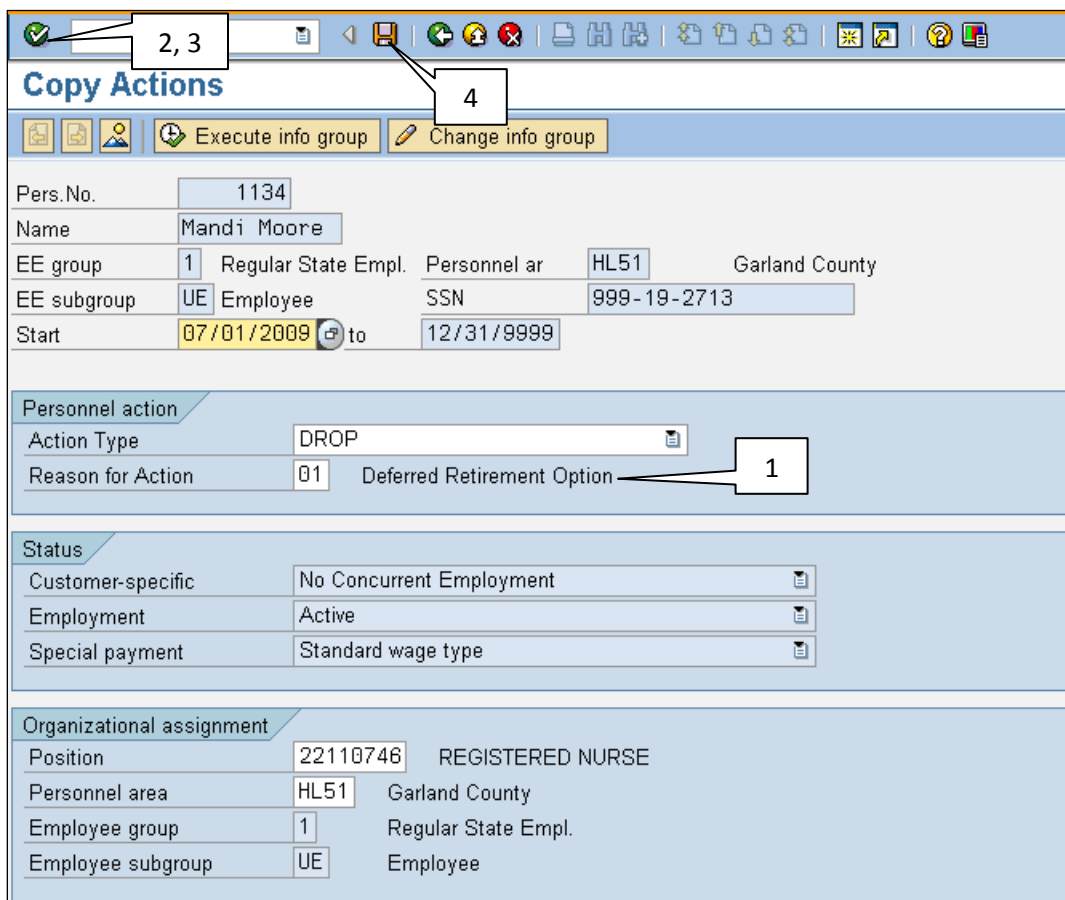
2. <Enter> . The system displays this message

 Record valid from 06/28/2009 to 12/31/9999 delimited at end

indicating the previous record's end date is changed.

3. <Enter>  to validate the information.

4. <Save>  to save the information.



Copy Actions

Execute info group | Change info group

Pers.No. 1134
 Name Mandi Moore
 EE group 1 Regular State Empl. Personnel ar HL51 Garland County
 EE subgroup UE Employee SSN 999-19-2713
 Start 07/01/2009 to 12/31/9999

Personnel action
 Action Type DROP
 Reason for Action 01 Deferred Retirement Option


Status
 Customer-specific No Concurrent Employment
 Employment Active
 Special payment Standard wage type

Organizational assignment
 Position 22110746 REGISTERED NURSE
 Personnel area HL51 Garland County
 Employee group 1 Regular State Empl.
 Employee subgroup UE Employee

Organizational Assignment (Infotype 0001)



There are two prompts associated with the use of the *Work Contract* field for a DROP employee to ensure accurate eligibility of benefits is allowed. Notification of the DROP action is sent to the Benefits Administrator.

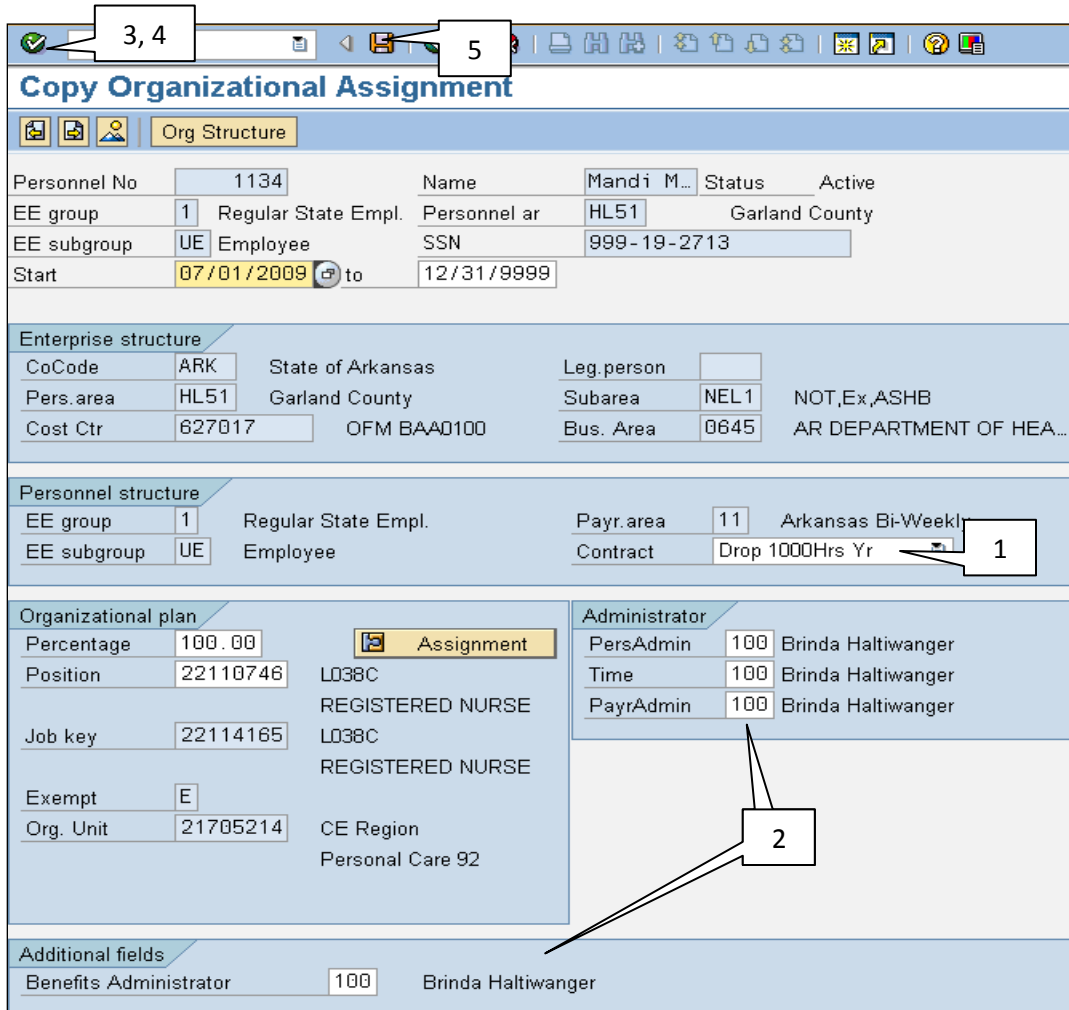
Action Steps:

1. Choose a *DROP* option from the *Work Contract* field.
2. Make any necessary changes to the *Administrators*.
3. <Enter> . The system displays this message

 Record valid from 06/28/2009 to 12/31/9999 delimited at end

indicating the previous record's end date is changed.

4. <Enter>  to validate the information.
5. <Save>  to save the information.



Copy Organizational Assignment

Personnel data

Personnel No 1134 Name Mandi M... Status Active
 EE group 1 Regular State Empl. Personnel ar HL51 Garland County
 EE subgroup UE Employee SSN 999-19-2713
 Start 07/01/2009 to 12/31/9999

Enterprise structure

CoCode ARK State of Arkansas Leg. person
 Pers. area HL51 Garland County Subarea NEL1 NOT,Ex,ASHB
 Cost Ctr 627017 OFM BAA0100 Bus. Area 0645 AR DEPARTMENT OF HEA...

Personnel structure

EE group 1 Regular State Empl. Payr. area 11 Arkansas Bi-Weekly
 EE subgroup UE Employee Contract Drop 1000Hrs Yr

Organizational plan

Percentage 100.00 Assignment
 Position 22110746 L038C
 Job key 22114165 L038C
 Exempt E REGISTERED NURSE
 Org. Unit 21705214 CE Region
 Personal Care 92

Administrator

PersAdmin 100 Brinda Haltiwanger
 Time 100 Brinda Haltiwanger
 PayrAdmin 100 Brinda Haltiwanger

Additional fields



Benefits Administrator 100 Brinda Haltiwanger

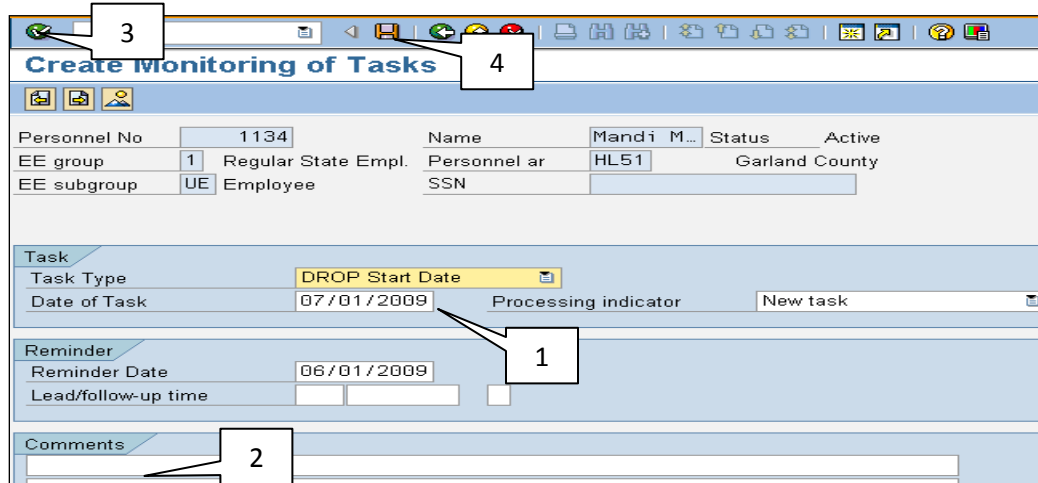
Callouts: 1 points to the 'Contract' field; 2 points to the 'Administrator' section; 3, 4 point to the top toolbar icons; 5 points to the 'Save' icon.

Monitoring of Tasks (Infotype 0019)

The *DROP start date* should be the same date as that entered at the start of the process on the *Personnel Actions* screen.

Action Steps:

1. Enter the *DROP Start Date*.
2. Enter any additional comments as needed.
3. <Enter>  to validate the information.
4. <Save>  to save the information.



Create Monitoring of Tasks

Personnel No	1134	Name	Mandi M...	Status	Active
EE group	1 Regular State Empl.	Personnel ar	HL51	Garland County	
EE subgroup	UE Employee	SSN			



Task	
Task Type	DROP Start Date
Date of Task	07/01/2009
Processing indicator	New task

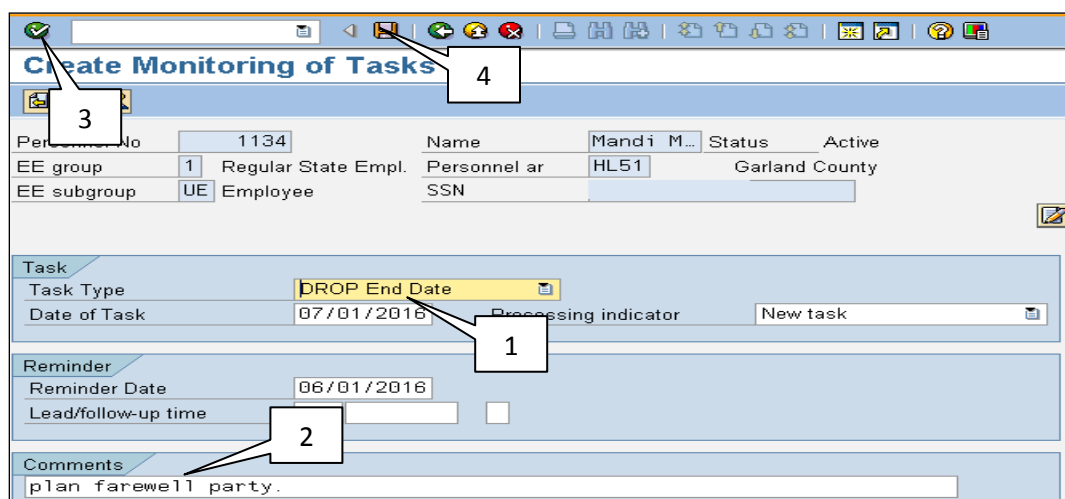
Reminder	
Reminder Date	06/01/2009
Lead/follow-up time	

Comments	

The *Drop End Date* is seven years from the *Drop Start Date*. The Reminder Date alerts the agency of action to be taken at the end of the Employee's DROP period.

Action Steps:

1. Enter the *DROP End Date*.
2. Enter any additional comments as needed.
3. <Enter>  to validate the information.
4. <Save>  to save the information.



Create Monitoring of Tasks

Personnel No	1134	Name	Mandi M...	Status	Active
EE group	1 Regular State Empl.	Personnel ar	HL51	Garland County	
EE subgroup	UE Employee	SSN			

Task	
Task Type	DROP End Date
Date of Task	07/01/2016
Processing indicator	New task


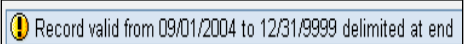


Reminder	
Reminder Date	06/01/2016
Lead/follow-up time	

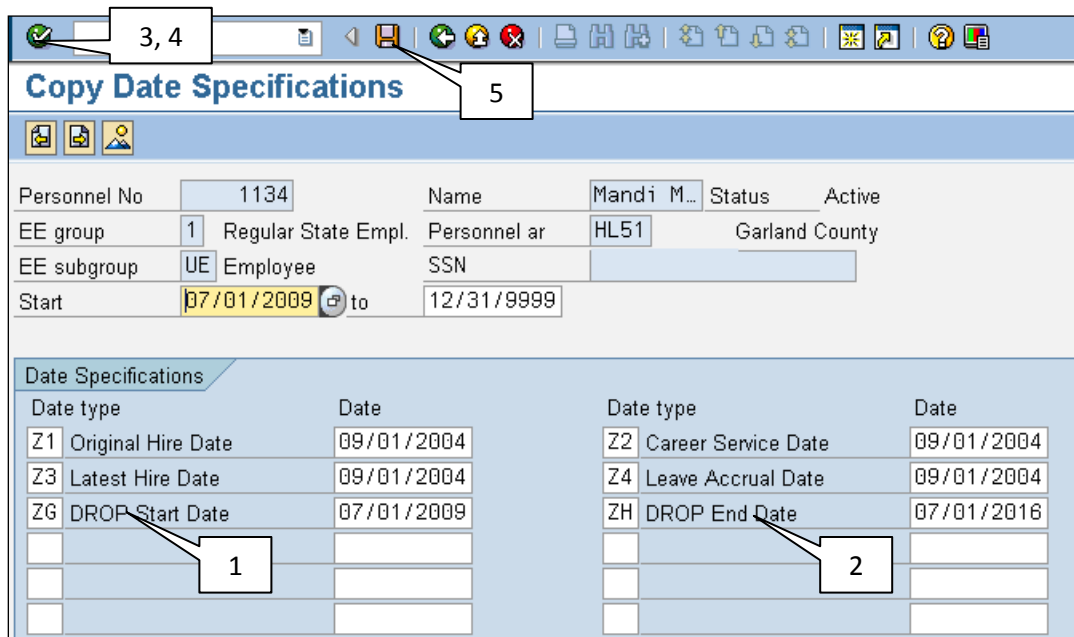
Comments	
plan farewell party.	

Date Specifications (Infotype 0041)

The *DROP Start Date* and *DROP End Date* need to be added this infotype.

Action Steps:

1. Select *DROP Start Date* from the drop-down list and enter the date.
2. Select *DROP End Date* from the drop-down list and enter the date.
3. <Enter> . The system displays this message
 indicating the previous record's end date is changed.
4. <Enter>  to validate the information.
5. <Save>  to save the information.



Copy Date Specifications

Personnel No 1134 Name Mandi M... Status Active
 EE group 1 Regular State Empl. Personnel ar HL51 Garland County
 EE subgroup UE Employee SSN
 Start 07/01/2009 to 12/31/9999


Date type	Date	Date type	Date
Z1 Original Hire Date	09/01/2004	Z2 Career Service Date	09/01/2004
Z3 Latest Hire Date	09/01/2004	Z4 Leave Accrual Date	09/01/2004
Z6 DROP Start Date	07/01/2009	ZH DROP End Date	07/01/2016

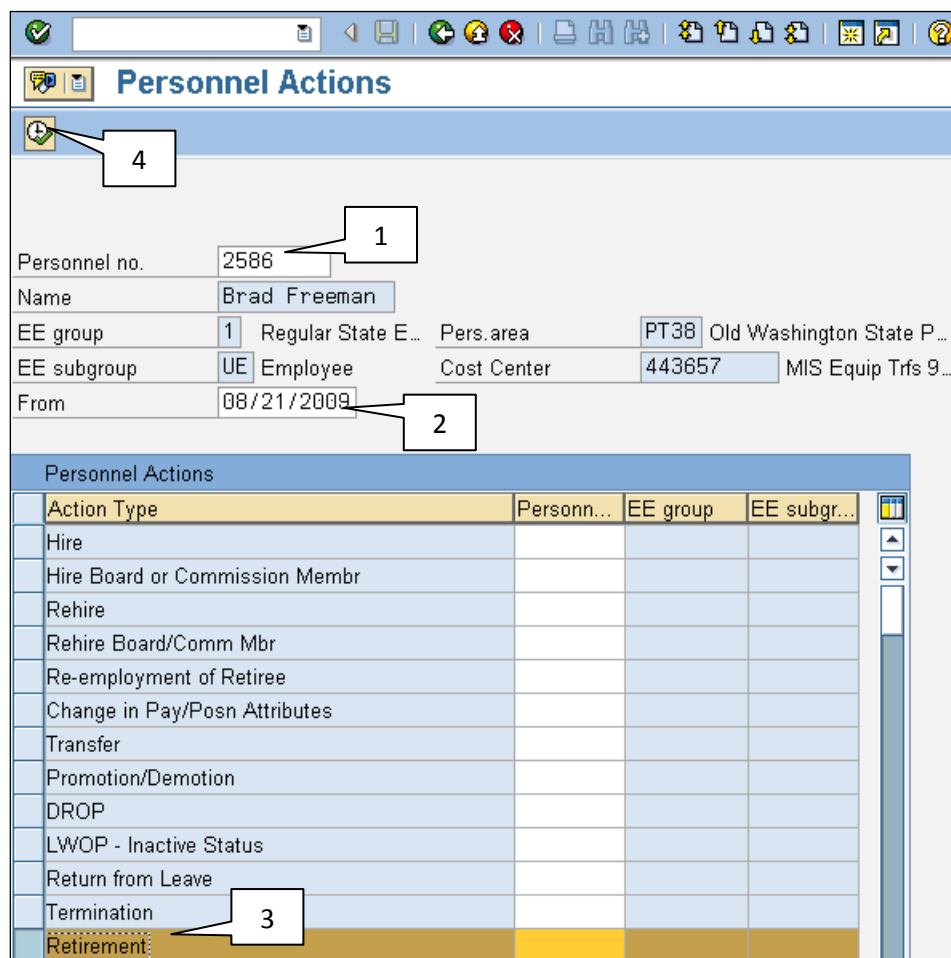
Retirement

After years of loyal service, an employee resigns from his position. In AASIS, the retired employee's master data, along with the personnel number is retained for historical purposes or in the event the employee is rehired. The retirement action is processed by using transaction code: *PA40 – Personnel Actions*.

Scenario: Brad Freeman is retiring and his last working day is August 21, 2009.

Action Steps:

1. Enter the *Personnel no.*
2. Enter the last working day at the agency.
3. Select *Retirement*.
4. <Execute>  to advance to the next screen.







Personnel Actions

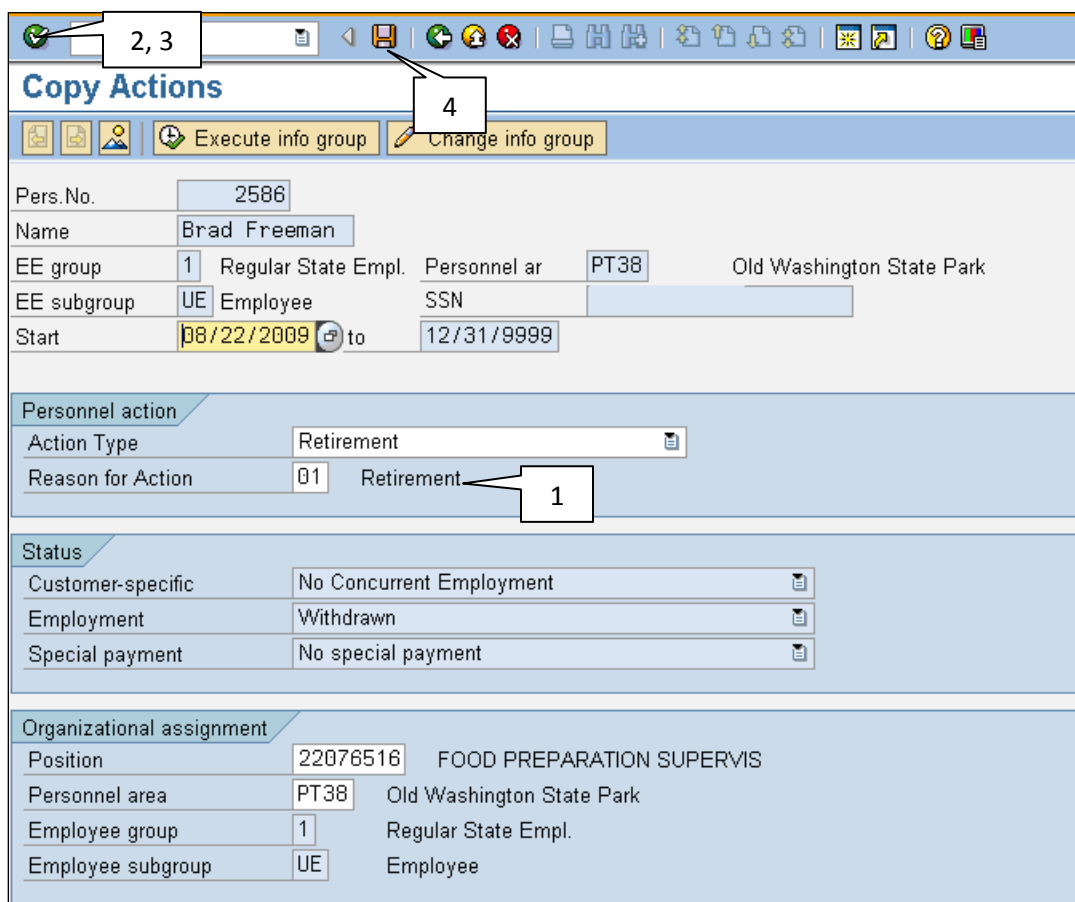
Personnel no. 2586
 Name Brad Freeman
 EE group 1 Regular State E... Pers.area PT38 Old Washington State P...
 EE subgroup UE Employee Cost Center 443657 MIS Equip Trfs 9...
 From 08/21/2009

Action Type	Personn...	EE group	EE subgr...
Hire			
Hire Board or Commission Membr			
Rehire			
Rehire Board/Comm Mbr			
Re-employment of Retiree			
Change in Pay/Posn Attributes			
Transfer			
Promotion/Demotion			
DROP			
LWOP - Inactive Status			
Return from Leave			
Termination			
Retirement			

Actions (Infotype 0000)

Action Steps:

1. Enter *Reason for Action*.
2. <Enter> . The system displays this message
 Record valid from 06/28/2009 to 12/31/9999 delimited at end indicating the previous record's end date is changed.
3. <Enter>  to validate the information.
4. <Save>  to save the information.



Copy Actions

Execute info group Change info group

Pers. No. 2586
 Name Brad Freeman
 EE group 1 Regular State Empl. Personnel ar PT38 Old Washington State Park
 EE subgroup UE Employee SSN
 Start 08/22/2009 to 12/31/9999

Personnel action
 Action Type Retirement
 Reason for Action 01 Retirement

Status
 Customer-specific No Concurrent Employment
 Employment Withdrawn
 Special payment No special payment

Organizational assignment
 Position 22076516 FOOD PREPARATION SUPERVIS
 Personnel area PT38 Old Washington State Park
 Employee group 1 Regular State Empl.
 Employee subgroup UE Employee

Organizational Assignment (Infotype 0001)



Notice the Position number changes to 99999999. This infotype is reflected as a display screen only; therefore, changes to administrators are not allowed.

1. <Next record>

1

Display Organizational Assignment

Org Structure

Personnel No.	2586	Name	Brad Fr...	Status	Withdrawn
EE group	1	Regular State Empl.	Personnel ar	PT38	Old Washington State Park
EE subgroup	UE	Employee	SSN	999-77-8654	
Start	08/22/2009	to	12/31/9999	Chng	08/25/2009 LMFL0YD01

Enterprise structure

CoCode	ARK	State of Arkansas	Leg.person	
Pers.area	PT38	Old Washington State Park	Subarea	0AL1 OT,Std,ASHB
Cost Ctr	443657	MIS Equip Trfs 986	Bus. Area	0900 DEPT OF PARKS AND TO...

Personnel structure

EE group	1	Regular State Empl.	Payr.area	11	Arkansas Bi-Weekly
EE subgroup	UE	Employee	Contract	1000 Hours/Year	

Organizational plan

Position	99999999	Integration: default posi
Job key	22113457	FOOD PREPARATION ...
Exempt	N	
Org. Unit	21690900	Department of Parks an...
Supervisor	0	

Administrator

PersAdmin	104	Terry Waggoner
Time	104	Terry Waggoner
PayrAdmin	105	Cindy Hatak



Additional fields

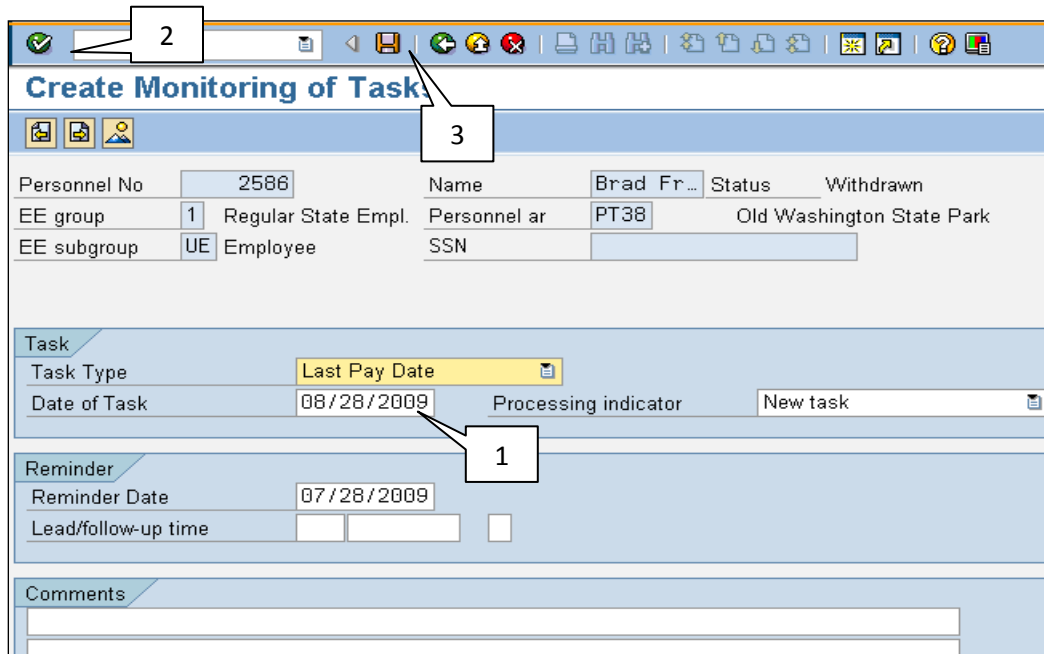
Benefits Administrator	105	Cindy Hatak
------------------------	-----	-------------

Monitor of Tasks (Infotype 0019)

This infotype must be completed when processing this action in order to provide the Last Warrant Date (the last pay date) for the Retiree.

Action Steps:

1. Enter the *Last Pay Date*.
2. <Enter>  to validate the information.
3. <Save>  to save the information.



The screenshot shows the 'Create Monitoring of Task' form. Callout 2 points to the 'Validate' button (a green checkmark in a square) in the top toolbar. Callout 3 points to the 'Save' button (a floppy disk icon) in the top toolbar. Callout 1 points to the 'Last Pay Date' field in the 'Task' section, which contains the date '08/28/2009'.

Personnel No	2586	Name	Brad Fr...	Status	Withdrawn
EE group	1 Regular State Empl.	Personnel ar	PT38	Old Washington State Park	
EE subgroup	UE Employee	SSN			

Task	
Task Type	Last Pay Date
Date of Task	08/28/2009
Processing indicator	New task

Reminder	
Reminder Date	07/28/2009
Lead/follow-up time	

Comments	

After completing the *Retirement* action, agency personnel must review the *Bank Details* for multiple direct deposits. This infotype is not affected by the Retirement action; therefore, the end user must review this infotype separately using *PA30*.


Reviewing Other Bank records under Bank Details (Infotype 0009)

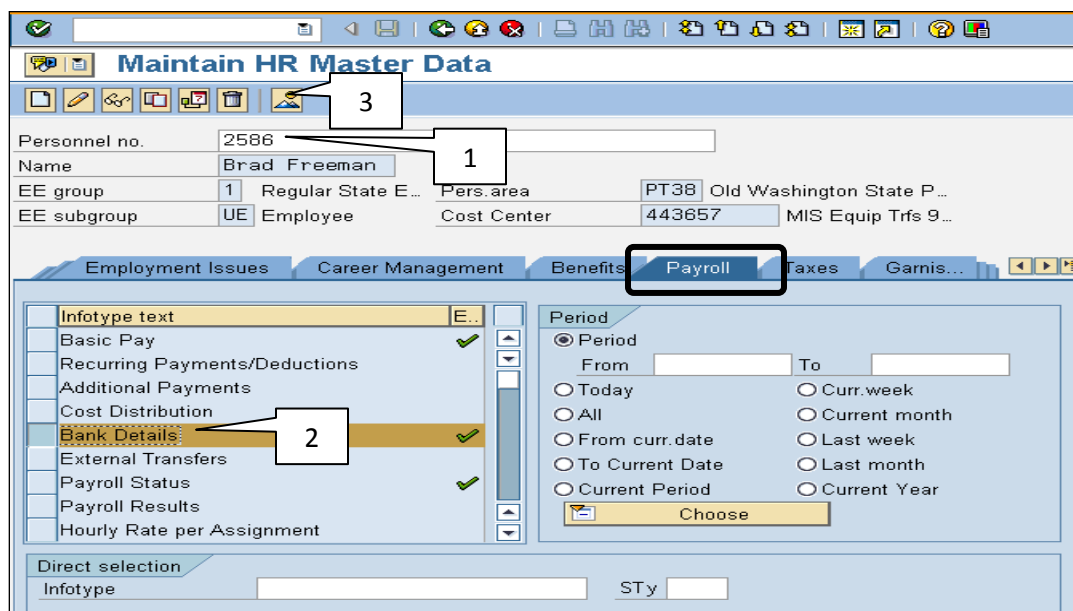
At the time of retirement, an employee may have more than one bank record. If multiple bank records exist, the Main Bank record must remain open while the Other Bank records must be delimited (ended.) Other bank detail changes to be made must be completed/submitted by the employee using the DFA, OPM form: Bank Details/Direct Deposit Enrollment Form.

When delimiting other bank records, the effective date is the last day of the pay period in which the employee retires. Therefore, the employee's last warrant will be deposited only to the main bank on record. Upon returning to the Personnel Actions screen, agency personnel must access *PA30* and review the *Bank Details (IT0009)* for multiple direct deposits.

Scenario: Brad Freeman's last working day is August 21, 2009. The last day of the pay period is August 28, 2009. This date is used when delimiting the other bank records.

Action steps for delimiting Other Bank records in PA30:

1. Enter the *Personnel no.*
2. Under the Payroll tab, select *Bank Details*.
3. <Overview> .



Maintain HR Master Data

Personnel no. 2586
 Name Brad Freeman
 EE group 1 Regular State E... Pers. area PT38 Old Washington State P...
 EE subgroup UE Employee Cost Center 443657 MIS Equip Trfs 9...


Employment Issues Career Management Benefits **Payroll** Taxes Garnis...

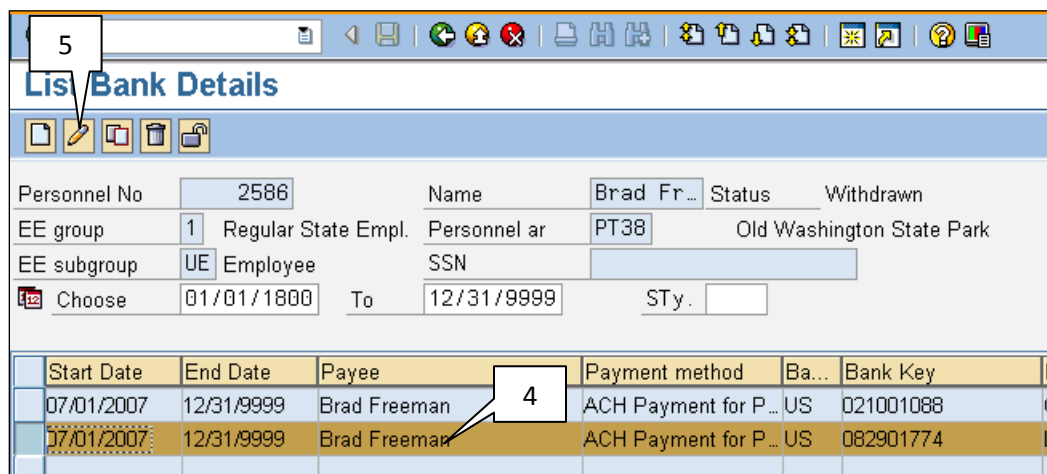
Infotype text E...
 Basic Pay ✓
 Recurring Payments/Deductions ✓
 Additional Payments ✓
 Cost Distribution ✓
Bank Details ✓
 External Transfers ✓
 Payroll Status ✓
 Payroll Results ✓
 Hourly Rate per Assignment ✓

Period
 From To
 Today Curr. week
 All Current month
 From curr. date Last week
 To Current Date Last month
 Current Period Current Year
 Choose

Direct selection
 Infotype STy

According to the records, this employee has two bank detail records.



4. Highlight the *Other Bank* record.
5. <Change> .

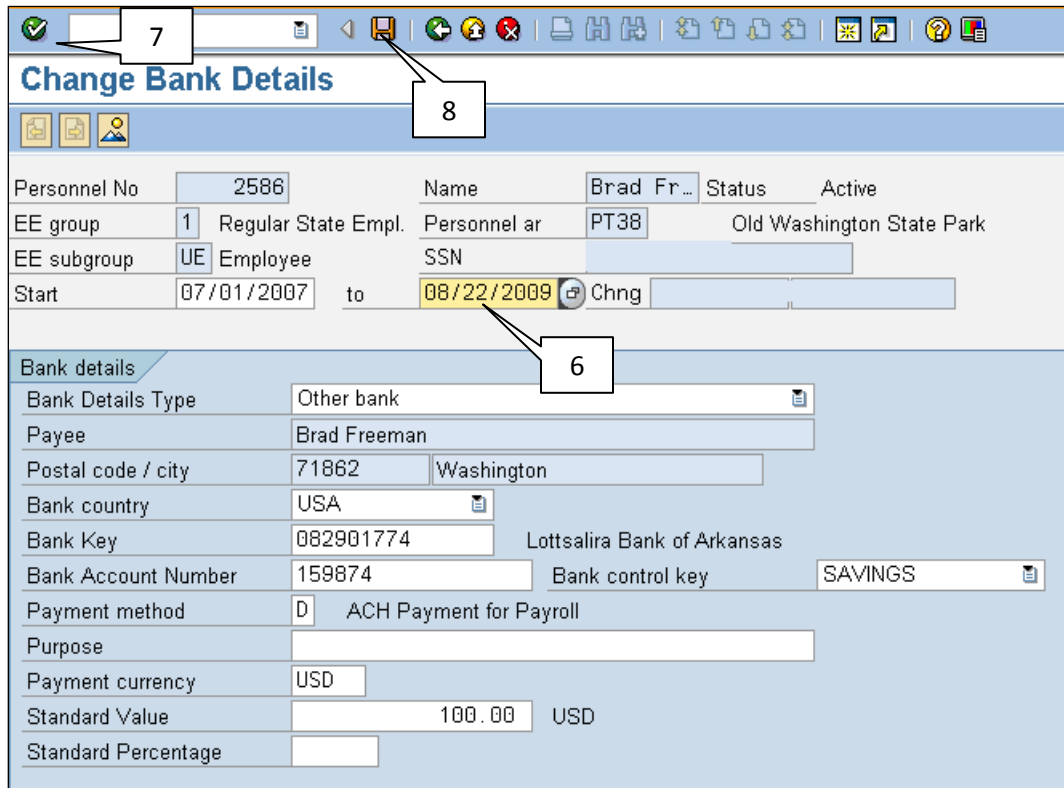


List Bank Details

Personnel No 2586 Name Brad Fr... Status Withdrawn
 EE group 1 Regular State Empl. Personnel ar PT38 Old Washington State Park
 EE subgroup UE Employee SSN
 Choose 01/01/1800 To 12/31/9999 STy.

Start Date	End Date	Payee	Payment method	Ba...	Bank Key	N
07/01/2007	12/31/9999	Brad Freeman	ACH Payment for P...	US	021001088	C
07/01/2007	12/31/9999	Brad Freeman	ACH Payment for P...	US	082901774	L

6. Change *To date* to the last date of the pay period the employee retires in.
7. <Enter>  to validate the information.
8. <Save>  to save the information and to return to *List Bank Details* screen.



Change Bank Details

Personnel No 2586 Name Brad Fr... Status Active

EE group 1 Regular State Empl. Personnel ar PT38 Old Washington State Park

EE subgroup UE Employee SSN

Start 07/01/2007 to 08/22/2009 Chng

Bank details

Bank Details Type Other bank

Payee Brad Freeman

Postal code / city 71862 Washington

Bank country USA

Bank Key 082901774 Lottsalira Bank of Arkansas

Bank Account Number 159874 Bank control key SAVINGS

Payment method D ACH Payment for Payroll

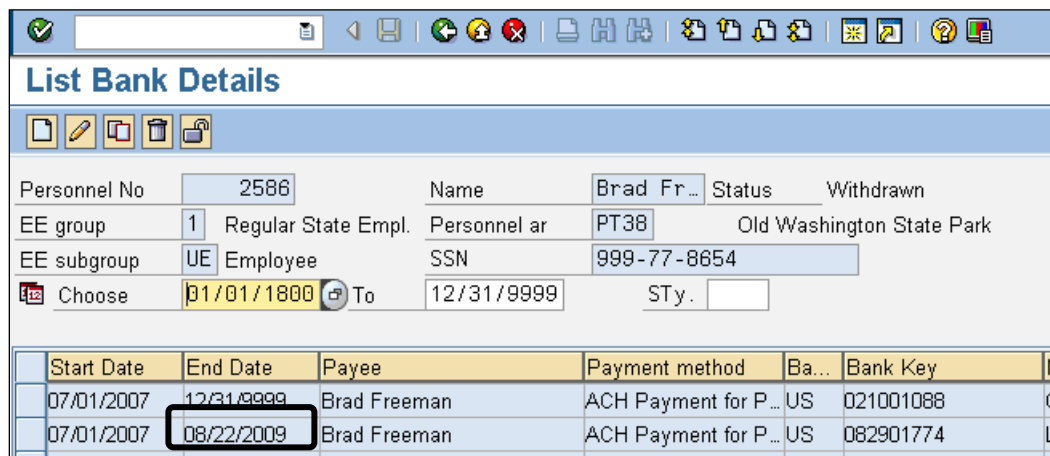
Purpose

Payment currency USD

Standard Value 100.00 USD

Standard Percentage

After the data entry process, you will return to the *List Bank Details* screen to view the ended direct deposit record. In the following screen, notice the revised end date for the other bank's direct deposit record has an *End Date*.



List Bank Details

Personnel No 2586 Name Brad Fr... Status Withdrawn

EE group 1 Regular State Empl. Personnel ar PT38 Old Washington State Park

EE subgroup UE Employee SSN 999-77-8654

Choose 01/01/1800 To 12/31/9999 STy.

Start Date	End Date	Payee	Payment method	Ba...	Bank Key	N
07/01/2007	12/31/9999	Brad Freeman	ACH Payment for P...	US	021001088	C
07/01/2007	08/22/2009	Brad Freeman	ACH Payment for P...	US	082901774	L


Termination

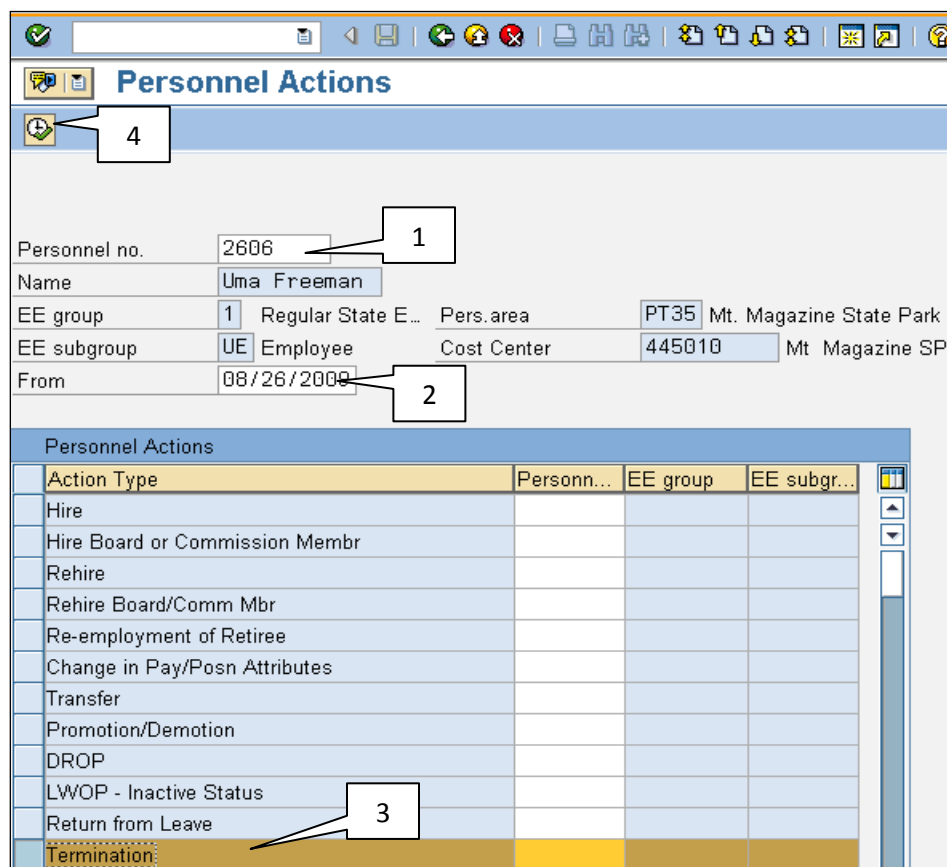
The *Termination* action must be entered immediately as any delay may result in an overpayment, notably for exempt employees. In AASIS, the terminated employee's master data, along with the personnel number, are retained for historical purposes or in the event the employee is rehired.

The termination date must not be earlier than the beginning of the first pay period of the fiscal year. Consult the Bi-weekly Schedule of Pay Periods issued by OPM. If it is necessary to have a *From* date beyond the first pay period of the fiscal year, the agency must submit a request with justification for approval to OPM/State Payroll.

Scenario: Uma Freeman is resigning from her current job. Her last day is August 26, 2009. Using PA40, enter the termination for Uma.

Action Steps:

1. Enter the *Personnel no.*
2. Enter the employee's last working date.
3. Select *Termination*.
4. <Execute>  to advance to the next screen.



Personnel Actions

Personnel no. 2606
 Name Uma Freeman
 EE group 1 Regular State E... Pers.area PT35 Mt. Magazine State Park
 EE subgroup UE Employee Cost Center 445010 Mt. Magazine SP
 From 08/26/2009

Action Type	Personn...	EE group	EE subgr...
Hire			
Hire Board or Commission Membr			
Rehire			
Rehire Board/Comm Mbr			
Re-employment of Retiree			
Change in Pay/Posn Attributes			
Transfer			
Promotion/Demotion			
DROP			
LWOP - Inactive Status			
Return from Leave			
Termination			


Actions (Infotype 0000)

The *Start* date will reflect the employee's last working day plus 1 day. Do not change this date because this change allows an employee to be paid for working their last day. If any time is recorded on the CAT2 Timesheet for the termination date or later, you will receive a hard error message (Timesheet entry after inactive period date must be deleted) and the system will prevent you from completing the *Termination* action. Contact the time entry personnel for correction of records before proceeding.


Action Steps:

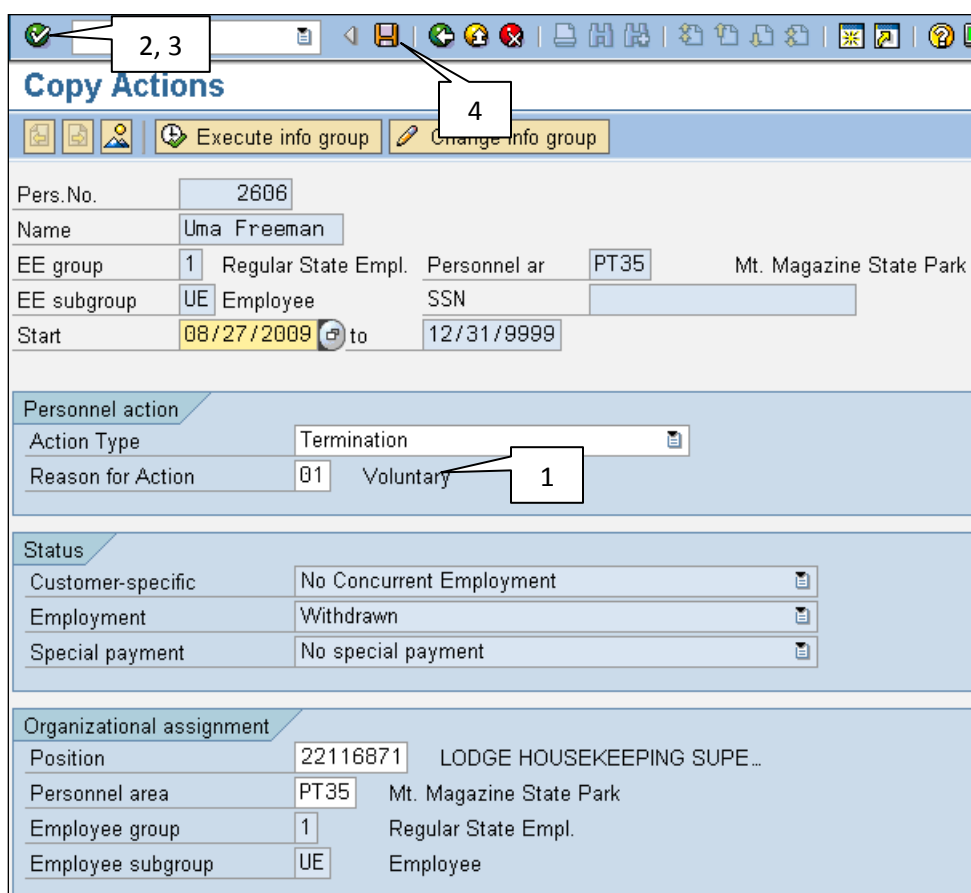
1. Select a reason from the drop-down list.

2. <Enter> . The system displays this message

 Record valid from 06/28/2009 to 12/31/9999 delimited at end indicating that the previous record's end date will change.

3. <Enter>  to validate the information.

4. <Save>  to save the information.



Copy Actions

Execute info group | Change info group

Pers.No. 2606
 Name Uma Freeman
 EE group 1 Regular State Empl. Personnel ar PT35 Mt. Magazine State Park
 EE subgroup UE Employee SSN
 Start 08/27/2009 to 12/31/9999

Personnel action
 Action Type Termination
 Reason for Action 01 Voluntary



Status
 Customer-specific No Concurrent Employment
 Employment Withdrawn
 Special payment No special payment

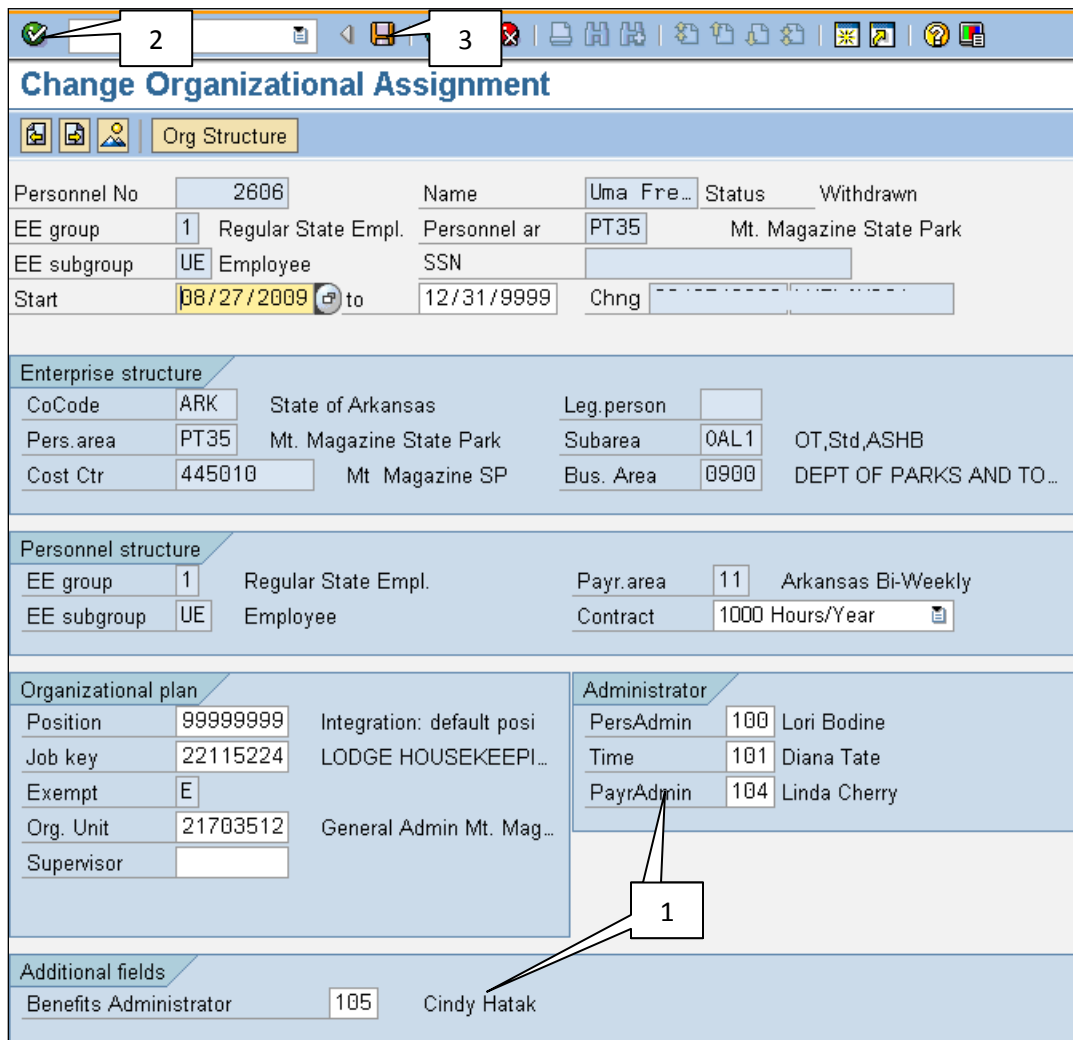
Organizational assignment
 Position 22116871 LODGE HOUSEKEEPING SUPE...
 Personnel area PT35 Mt. Magazine State Park
 Employee group 1 Regular State Empl.
 Employee subgroup UE Employee

Organizational Assignment (Infotype 0001)

Workflow messages are sent to both Time and Payroll Administrators at the time of the termination action. It is critical that all agency personnel communicate during this process. Note: the position number under Organizational plan changes to 99999999.

Action Steps:

1. Verify and select the employee's *PersAdmin.*, *Time*, *PayrAdmin*, and *Benefits administrator*.
2. <Enter>  to validate the information.
3. <Save>  to save the information.



Change Organizational Assignment

Org Structure

Personnel No	2606	Name	Uma Fre...	Status	Withdrawn
EE group	1 Regular State Empl.	Personnel ar	PT35	Mt. Magazine State Park	
EE subgroup	UE Employee	SSN			
Start	08/27/2009 to	12/31/9999	Chng		

Enterprise structure

CoCode	ARK	State of Arkansas	Leg.person	
Pers.area	PT35	Mt. Magazine State Park	Subarea	0AL1 OT,Std,ASHB
Cost Ctr	445010	Mt Magazine SP	Bus. Area	0900 DEPT OF PARKS AND TO...

Personnel structure

EE group	1 Regular State Empl.	Payr.area	11 Arkansas Bi-Weekly
EE subgroup	UE Employee	Contract	1000 Hours/Year

Organizational plan

Position	99999999	Integration: default posi
Job key	22115224	LODGE HOUSEKEEPI...
Exempt	E	
Org. Unit	21703512	General Admin Mt. Mag...
Supervisor		

Administrator

PersAdmin	100	Lori Bodine
Time	101	Diana Tate
PayrAdmin	104	Linda Cherry



Additional fields

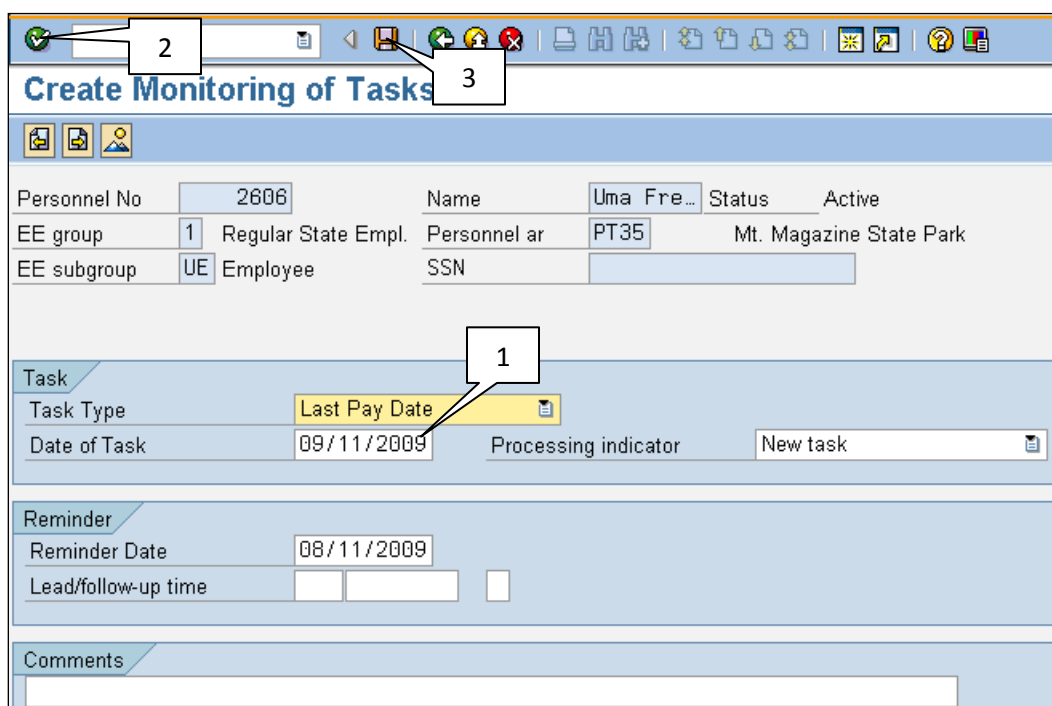
Benefits Administrator	105	Cindy Hatak
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Monitoring of Tasks (Infotype 0019)

This screen is used by agency personnel to monitor events that are associated with terminations, such as an employee's last pay date.

Action Steps:

1. Enter employee's last received warrant date and additional comments.
2. <Enter>  to validate the information.
3. <Save>  to save information.



The screenshot shows the 'Create Monitoring of Tasks' screen. At the top, there is a toolbar with various icons. Callout 2 points to a checkmark icon in the toolbar. Callout 3 points to a save icon in the toolbar. The main form area is divided into several sections:

- Personnel Information:** Personnel No (2606), Name (Uma Fre...), Status (Active), EE group (1 Regular State Empl.), Personnel ar (PT35), Mt. Magazine State Park, EE subgroup (UE Employee), and SSN.
- Task Section:** Task Type (Last Pay Date), Date of Task (09/11/2009), Processing indicator (New task), and a callout 1 pointing to the Date of Task field.
- Reminder Section:** Reminder Date (08/11/2009) and Lead/follow-up time.
- Comments Section:** A text area for additional comments.

Objects on Loan (Infotype 0040) – Object Return

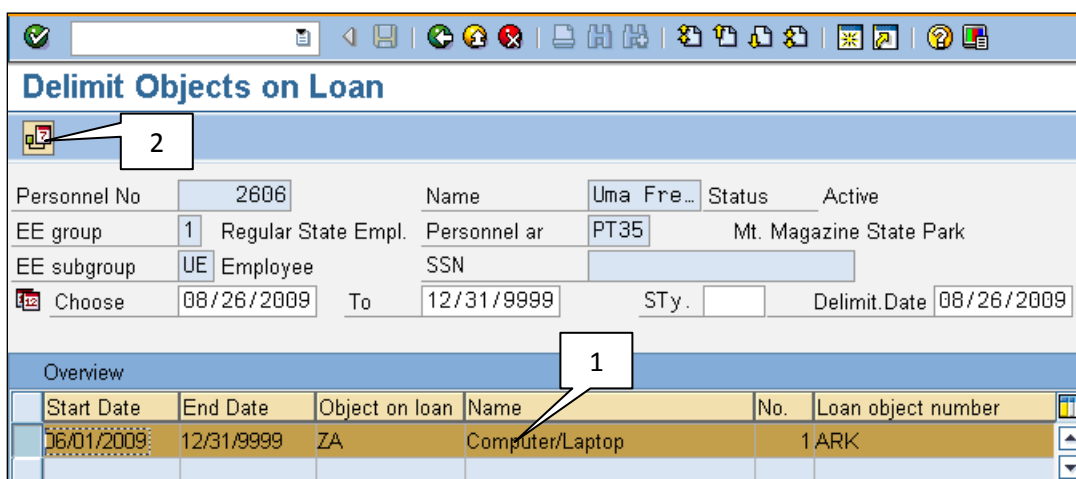
If the employee does not have any objects (uniforms, computers, etc) on loan recorded in this infotype, this screen will not appear and the *Termination* Action is completed.

If there are objects listed, the delimit icon changes the long running end date (12/31/9999) to an actual ending date (04/30/2008) in a record.

Action steps:

1. Highlight the object.

2. <Delimit> .



Delimit Objects on Loan

Personnel No 2606 Name Uma Fre... Status Active
 EE group 1 Regular State Empl. Personnel ar PT35 Mt. Magazine State Park
 EE subgroup UE Employee SSN
 Choose 08/26/2009 To 12/31/9999 STy. Delimit.Date 08/26/2009

Overview

Start Date	End Date	Object on loan	Name	No.	Loan object number
06/01/2009	12/31/9999	ZA	Computer/Laptop	1	ARK

After completing the *Termination action*, agency personnel must review the *Bank Details* for multiple direct deposits. This infotype is not changed by the Termination action; therefore, the end user must review this infotype separately using PA30.


Reviewing Other Bank records under Bank Details (Infotype 0009)

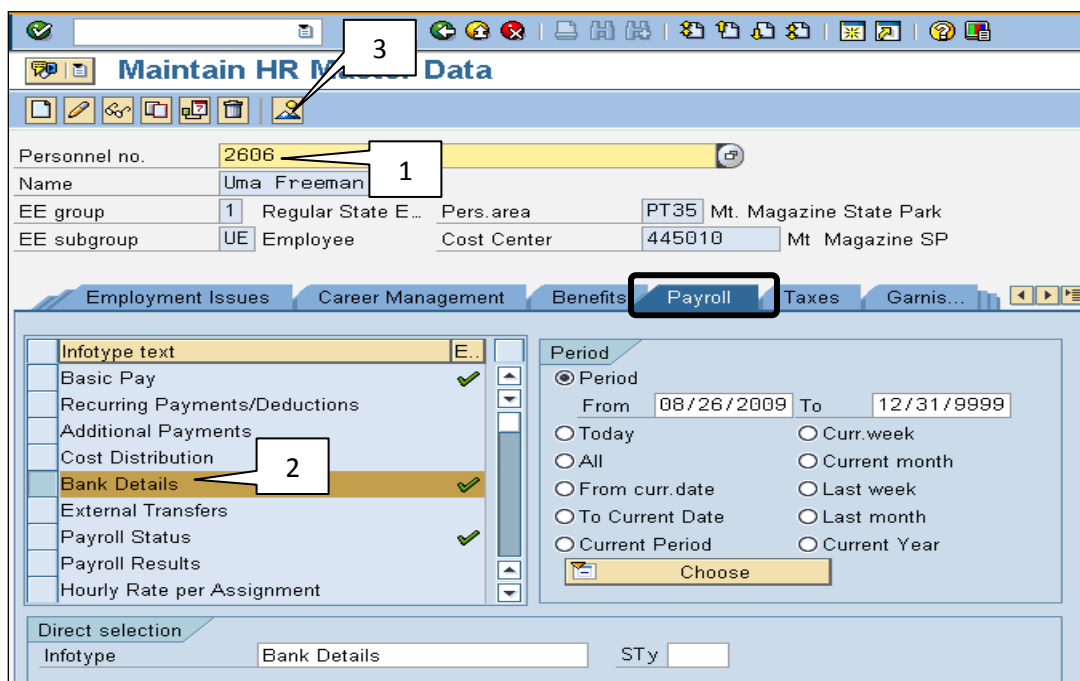
At the time the termination action is performed by the Agency, the terminated employee may have more than one bank record. If there are multiple bank records, the Main Bank record must remain open while the Other Bank records must be delimited (ended.) Any other bank detail changes are completed via the employee's written submission of DFA OPM form: Bank Details/Direct Deposit Enrollment Form.

When delimiting the *Other Bank* records, the effective date must be the last day of the pay period the employee is terminated. Therefore, the employee's entire final warrant is deposited only to the main bank on record.

Scenario: Uma Freeman's last working day is August 26, 2009. The last day of the pay period for which this date falls, is September 11, 2009. This date is used when delimiting the Other Bank records.

Action steps for delimiting Other Bank records:

1. Using *PA30*, enter the *Personnel no.*
2. Under the Payroll tab, select *Bank Details*.
3. <Overview> .



Maintain HR Master Data

Personnel no. 2606
 Name Uma Freeman
 EE group 1 Regular State E... Pers.area PT35 Mt. Magazine State Park
 EE subgroup UE Employee Cost Center 445010 Mt. Magazine SP

Employment Issues Career Management Benefits **Payroll** Taxes Garnis...


Infotype text E...
 Basic Pay ☒
 Recurring Payments/Deductions ☒
 Additional Payments ☒
 Cost Distribution ☒
Bank Details ☒
 External Transfers ☒
 Payroll Status ☒
 Payroll Results ☒
 Hourly Rate per Assignment ☒

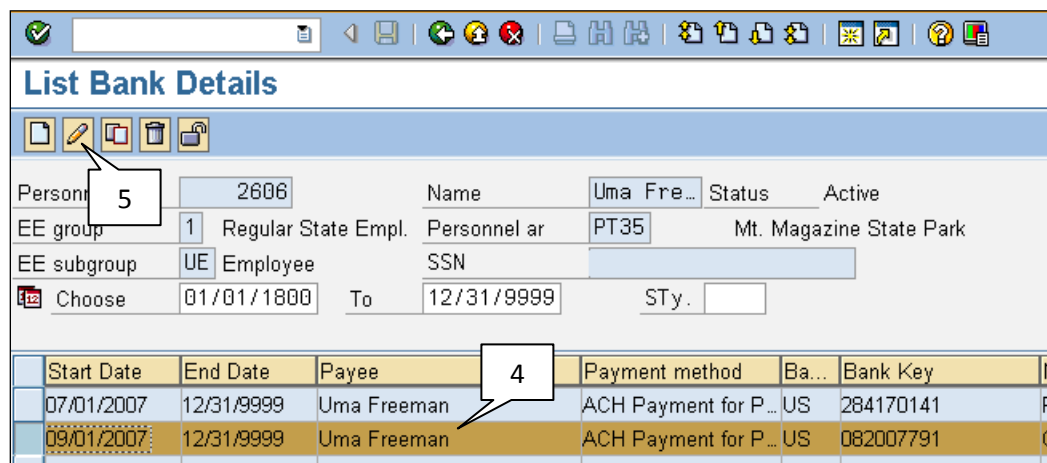
Period
 From 08/26/2009 To 12/31/9999
☐ Today ☐ Curr. week
☐ All ☐ Current month
☐ From curr. date ☐ Last week
☐ To Current Date ☐ Last month
☐ Current Period ☐ Current Year

Direct selection
 Infotype Bank Details STy

According to the records, this employee has two bank detail records.

4. Highlight the *Other Bank* record.



5. <Change> .

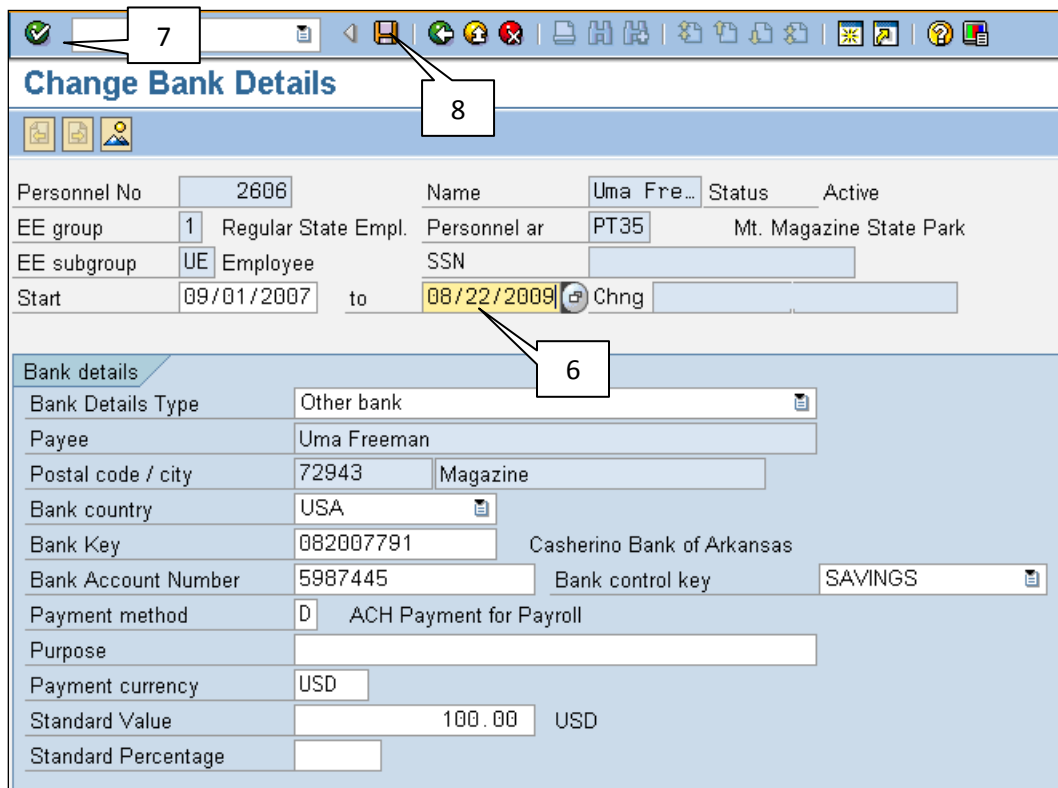


List Bank Details

Personnel no. 2606 Name Uma Freeman Status Active
 EE group 1 Regular State Empl. Personnel ar PT35 Mt. Magazine State Park
 EE subgroup UE Employee SSN
 01/01/1800 To 12/31/9999 STy

Start Date	End Date	Payee	Payment method	Ba...	Bank Key	N
07/01/2007	12/31/9999	Uma Freeman	ACH Payment for P...	US	284170141	P
09/01/2007	12/31/9999	Uma Freeman	ACH Payment for P...	US	082007791	C

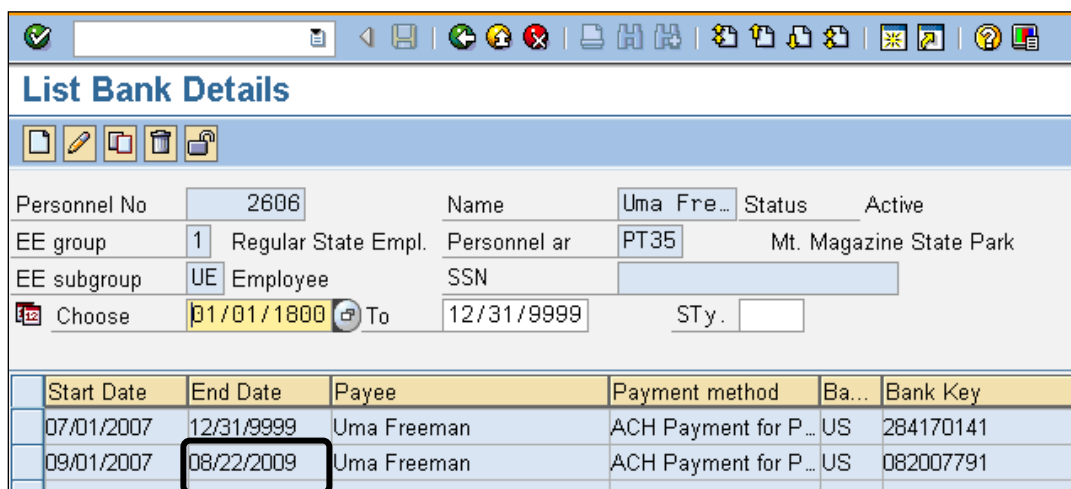
6. Change *To* date to the last date of the pay period.
7. <Enter>  to validate the information.
8. <Save>  to save the information and to return to *List Bank Details* screen.



Change Bank Details

Personnel No: 2606 Name: Uma Fre... Status: Active
 EE group: 1 Regular State Empl. Personnel ar: PT35 Mt. Magazine State Park
 EE subgroup: UE Employee SSN:
 Start: 09/01/2007 to: 08/22/2009 Chng:
 Bank details
 Bank Details Type: Other bank
 Payee: Uma Freeman
 Postal code / city: 72943 Magazine
 Bank country: USA
 Bank Key: 082007791 Casherino Bank of Arkansas
 Bank Account Number: 5987445 Bank control key: SAVINGS
 Payment method: D ACH Payment for Payroll
 Purpose:
 Payment currency: USD
 Standard Value: 100.00 USD
 Standard Percentage:
 Callout 6 points to the 'To' date field (08/22/2009) in the 'Start' to 'Chng' range.
 Callout 7 points to the 'Enter' key icon in the top toolbar.
 Callout 8 points to the 'Save' key icon in the top toolbar.

After the data entry process, return to the *List Bank Details* screen where you may view the ended direct deposit record. In the following screen, notice the revised end date for the other bank's direct deposit record has a new *End Date*.



List Bank Details

Personnel No: 2606 Name: Uma Fre... Status: Active
 EE group: 1 Regular State Empl. Personnel ar: PT35 Mt. Magazine State Park
 EE subgroup: UE Employee SSN:
 Choose: 01/01/1800 To: 12/31/9999 STy:

Start Date	End Date	Payee	Payment method	Ba...	Bank Key
07/01/2007	12/31/9999	Uma Freeman	ACH Payment for P...	US	284170141
09/01/2007	08/22/2009	Uma Freeman	ACH Payment for P...	US	082007791

 The 'End Date' 08/22/2009 in the second record is highlighted with a red box.

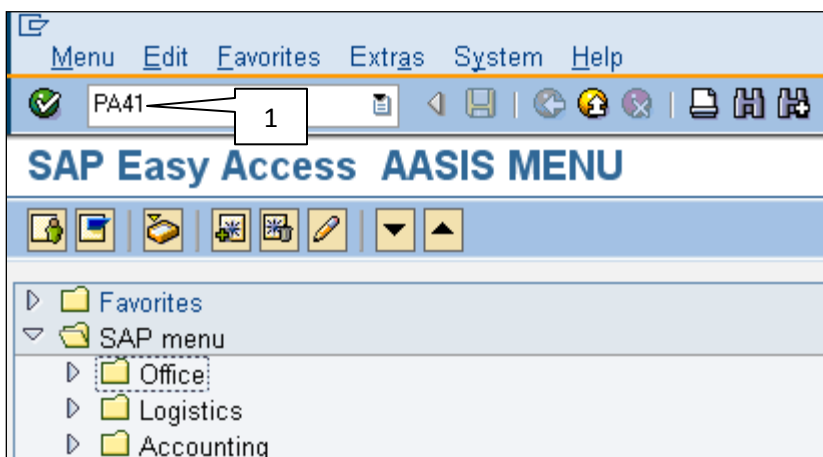
Correction of a Termination Date

This procedure demonstrates how to correct an incorrect termination date. Communication regarding the erroneous termination date is extremely important to Time, Payroll, and Benefits administrators. Within minutes of completing the action, the system begins terminating the employee's benefits and time accruals. Correction of an erroneous termination date must be performed on the same date as the initial action using transaction *PA41 Change Entry/Leave Date*.

Scenario: Edward Earnest resigns from his position. Upon completion of the *Termination* action, you realize the termination date is incorrect. The correct termination date is June 26, not June 27.

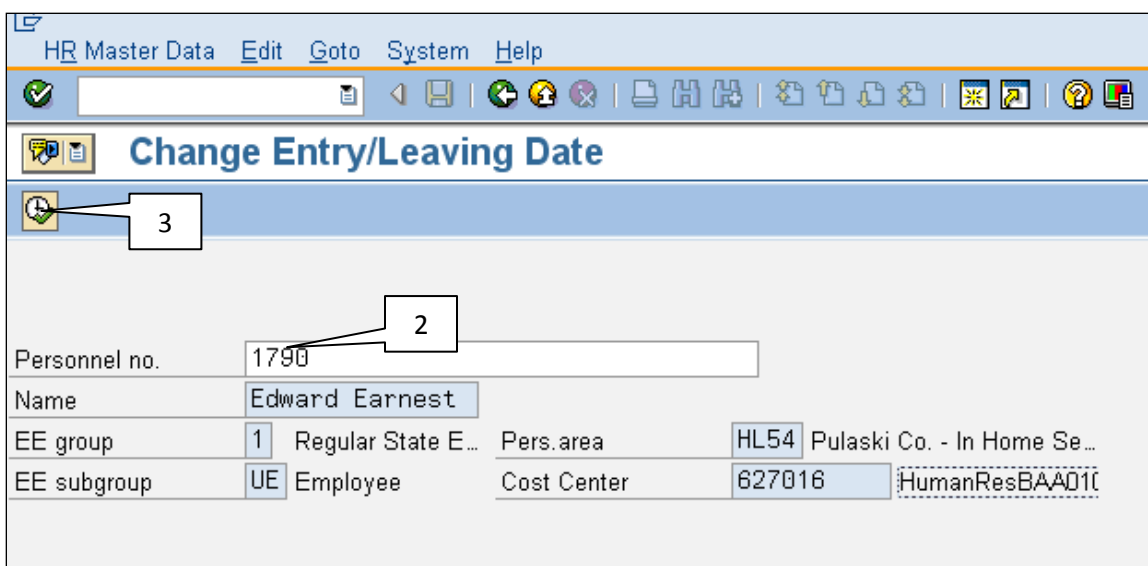
Action Steps:

1. Enter **PA41** in the command field and press the Enter key on the keyboard.





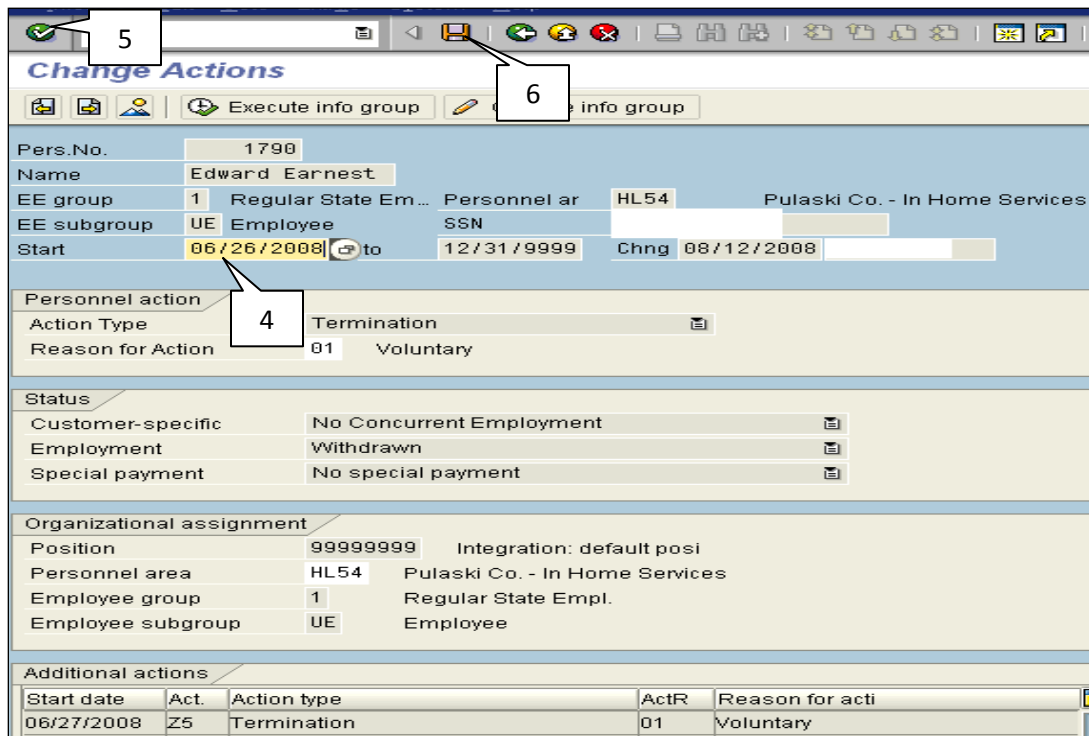
2. Enter the personnel number. <Enter>

3. <Execute>



The *Actions* screen will display reflecting the termination action.

4. In the *Start Date*, change the incorrect date (06/27/2008) to the correct date (06/26/2008)
5. <Enter>  to validate the information.
6. <Save>  to save the information.



Change Actions

Execute info group info group

Pers.No. 1798
 Name Edward Earnest
 EE group 1 Regular State Em... Personnel ar HL54 Pulaski Co. - In Home Services
 EE subgroup UE Employee SSN [redacted]
 Start 06/26/2008 to 12/31/9999 Chng 08/12/2008

Personnel action
 Action Type Termination
 Reason for Action 01 Voluntary

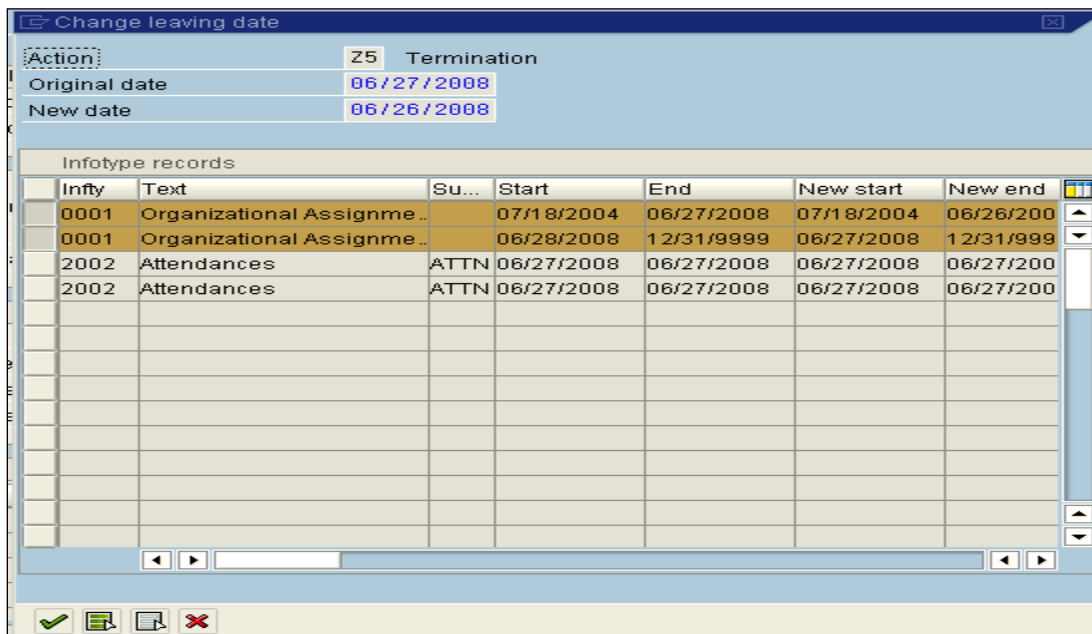
Status
 Customer-specific No Concurrent Employment
 Employment Withdrawn
 Special payment No special payment

Organizational assignment
 Position 99999999 Integration: default posi
 Personnel area HL54 Pulaski Co. - In Home Services
 Employee group 1 Regular State Empl.
 Employee subgroup UE Employee

Additional actions

Start date	Act.	Action type	ActR	Reason for acti
06/27/2008	Z5	Termination	01	Voluntary

The *Change leaving date* box is reflected, containing all infotypes affected by the change.



Change leaving date

Action Z5 Termination
 Original date 06/27/2008
 New date 06/26/2008


Infotype records

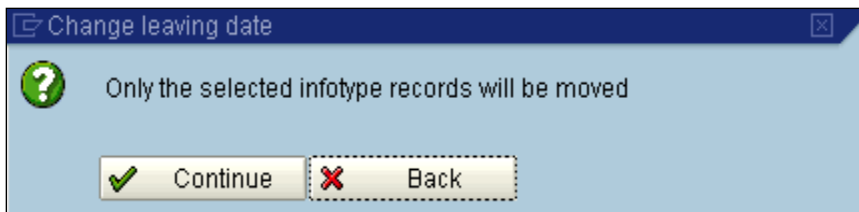
Infy	Text	Su...	Start	End	New start	New end
0001	Organizational Assignme..		07/18/2004	06/27/2008	07/18/2004	06/26/200
0001	Organizational Assignme..		06/28/2008	12/31/9999	06/27/2008	12/31/999
2002	Attendances	ATTN	06/27/2008	06/27/2008	06/27/2008	06/27/200
2002	Attendances	ATTN	06/27/2008	06/27/2008	06/27/2008	06/27/200

Warning:

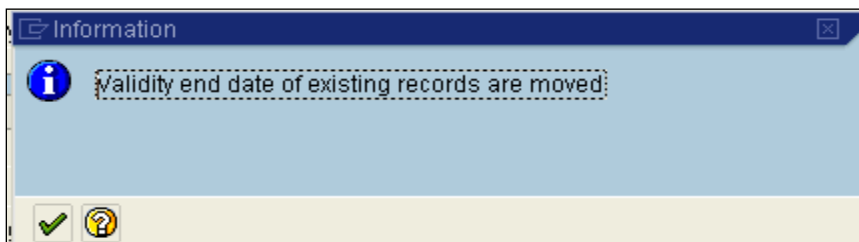
If **Infotype 2001 Absences** or **2002 Attendances** are present, do not highlight them! Contact the agency Time Administrator who handles time entry to make the corrections.

After correction process is completed, the Time, Payroll, and Benefits administrators **MUST** be notified regarding this correction to ensure their records are not affected by the mistake and correction.

7. <Green check mark>  and the following message box is reflected.



8. <Continue>  Continue and another message is reflected.



9. <Green check mark>  to complete the correction.